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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, February 18, 2004
Time: 9:30 a.m. – 11:30 a.m.
Location: City Hall in Room 201
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Note: The Mayor has top priority for this conference room.

Please refer to the website for any last minute changes.

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AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

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Issued: Wednesday, February 11, 2004

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DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, FEBRUARY 18, 2004

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the November 17, 2003 meeting *(Action Item)***
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentation by Kevin Stange (Discussion Item)*

   "Quarterly Briefing: San Francisco's Labor Market"
5. Consent Calendar *(Action Item)**

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

   A. Proposed Action: Approval of One Stop Memorandum of Understanding (MOU) with Department of Rehabilitation and the Continuation of Other One Stop Partner MOUs
   B. Proposed Action: Approval of "Innovations" in the One Stop Business Plan
   C. Proposed Action: Ratification of Strategic Priorities for the San Francisco Youth Council
   D. Proposed Action: Ratification of Proposal to Align PIC Youth Service RFP with DCYF RFP
   E. Proposed Action: Ratification of Mayor's Office of Community Development Grant Proposal
   F. Proposed Action: Ratification of Customized Training Funding to the San Francisco Hotel/Restaurant Labor/Management Education Funds Project
   G. Proposed Action: Ratification of Index – Self-Sufficiency Standard
   H. Proposed Action: Ratification of Recommendations for Dislocated Workers Work Group Priorities
   I. Proposed Action: Ratification of Selection of Auditor

6. Executive Committee Recommendations (Action Item)*
   A. Proposed Action: Ratification of Recommendations for Final and Carry Forward Refugee Formula Funds
   B. Ratification of First Source Hiring Administration (FSHA) Training Program Recommendations for the period Jan 5, 2004 to Dec 31, 2004 (Action Item)
   C. Proposed Action: Ratification of Addition of Qualified Vendor to Vendors List
7. Committee Reports (Information Item)
   A. Finance Subcommittee
   B. Employer Services Committee
   C. One Stop Operations and Services Committee
   D. Program Resources Committee
   E. Youth Council
8. President's Report (Discussion Item)
9. Chair's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Future Agenda Items (Discussion Item)
12. Adjournment *(Action Item)*

*Information enclosed.

** Information enclosed.

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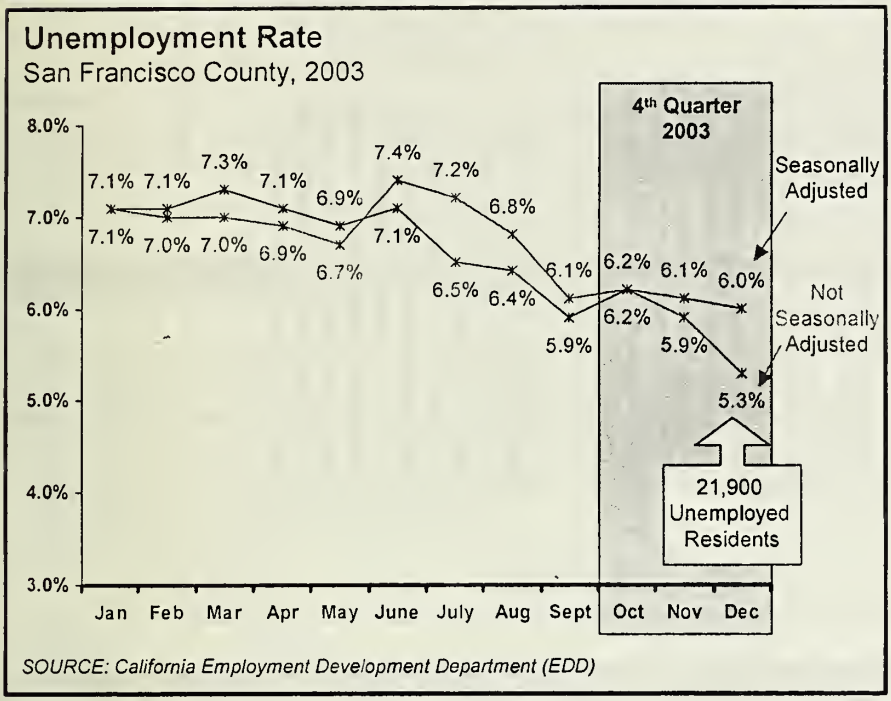
WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

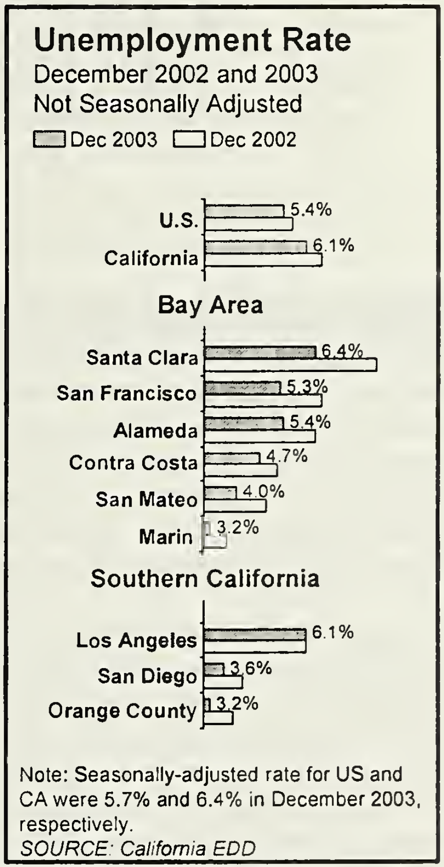
Quarterly Briefing: *San Francisco's Labor Market*

A Publication to Inform
San Francisco's Workforce and Economic Development Community
January 2004

Labor Force Stabilizes • Unemployment Rate drops to 5.3%


Unemployment Rate
San Francisco County, 2003

SOURCE: *California Employment Development Department (EDD)*


Unemployment Rate
December 2002 and 2003
Not Seasonally Adjusted

Note: Seasonally-adjusted rate for US and CA were 5.7% and 6.4% in December 2003, respectively.
SOURCE: *California EDD*

The unemployment rate in San Francisco dropped over the holiday season, reaching a new low of 5.3% in December of 2003. Adjusted for typical seasonal fluctuations, however, the unemployment rate has remained relatively stable since September. As a result, nearly 22,000 San Franciscans were still unemployed and looking for work at the end of 2003. Nonetheless, the rate of joblessness and number of unemployed workers has not been this low since the summer of 2001.

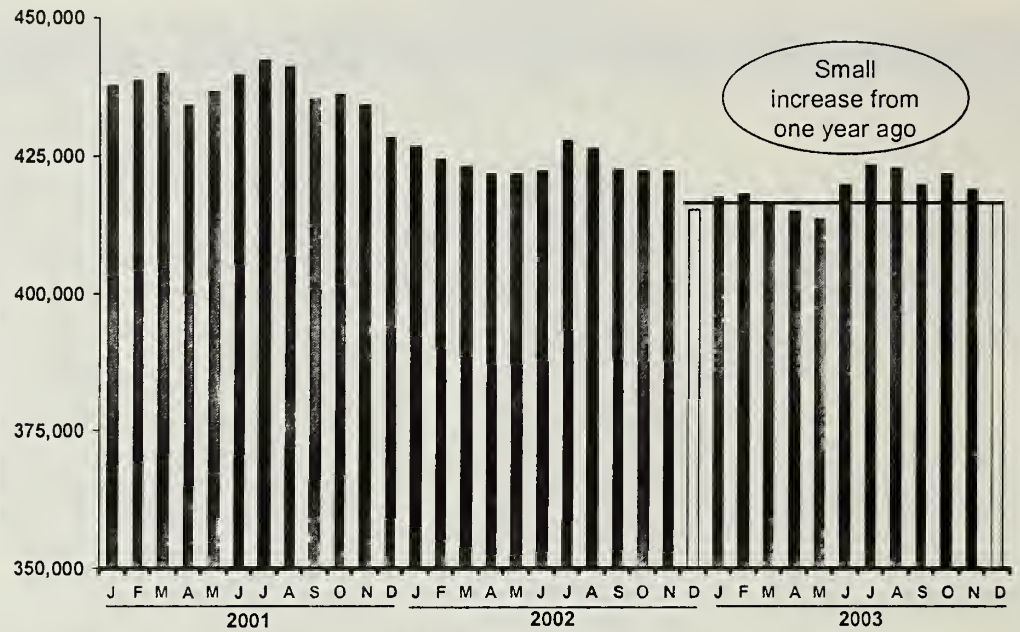
Perhaps most encouraging, San Francisco's resident labor force has finally stabilized. As depicted on the reverse page, **December marks the first year-over-year increase in San Francisco's labor force since the downturn began.** Until now, the troubling exodus of San Francisco's workers from the City has tempered most positive economic news. By December, labor force entrants such as new residents and people returning to work outnumbered those who had given up their job search, returned to school, or moved from the City during 2003. While future months will determine if this development persists, it is welcome nonetheless.

San Francisco's steady economic improvement over the past year – the unemployment rate dropped by 1.3 percentage points – has exceeded that of other areas of the country. San Francisco's unemployment rate is now lower than the US overall, California, Los Angeles, and Alameda County, all of which were relatively better off than San Francisco one year ago. Only Santa Clara County, which began the year with greater than 8% unemployment, has seen a greater absolute unemployment rate improvement over the year.

Short Term Outlook: Stable Labor Force + Confident Businesses ≠ Hiring (yet)

While all the ingredients for employment growth are present – a stabilized labor force, fewer unemployed, increased demand for final goods, confident businesses, and an attractive commercial real estate market – there is little evidence that firms have resumed hiring en-mass. On the positive side, unmet demand still persists for some occupations despite the downturn, most notably in health care.

Resident Labor Force*
San Francisco County



** Number of San Francisco residents who are either employed or unemployed, but looking for work.*
SOURCE: California Employment Development Department (EDD)

Strong Holiday Season • Industry Employment Unchanged • Upbeat Fed Report

The final months of 2003 proved to be a strong for retailers. Nationally, most retail chains improved over last year's disappointing results and the National Retail Federation estimated that holiday retail sales would rise 5.7 percent over last year, compared with a mere 2.2 percent increase in 2002. As several others have noted, Bay Area retailers appeared to share in these gains, partially due to a return of tourism.[1]. As expected, employment in San Francisco retail establishments jumped in November and December past its level of one year ago, but not by more than is typical of the season. Employment in all other major sectors was virtually unchanged from September.

The Federal Reserve Bank provided a generally upbeat report on economic conditions in the Western U.S. in its most recent Beige Book, a periodic report on regional economic developments.[2] The Fed reported robust holiday spending and less price discounting than last year for the Western U.S and that firms have begun to purchase more advertising, marketing, accounting, and legal services, which should bolster San Francisco's employment in these industries. In addition, the Fed noted that several commercial landlords reported that businesses have begun moving into San Francisco from outlying suburbs to take advantage of the still-low office space rents. If enduring, these developments will translate into employment needs that San Francisco's workforce development system must fill. Increased effort must be made to better understand the workforce needs of businesses relocating to and expanding in San Francisco.

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[1] For instance, see "11th Hour Spree Helps Retailers," *San Francisco Chronicle*, 12/31/03; "A December to Remember," *San Francisco Business Times*, 1/6/2004; and "Retailers' Happy Holidays," *San Francisco Chronicle*, 1/9/2004.

[2] *Summary of Commentary on Current Economic Conditions by Federal Reserve District*, January 14, 2004, available at http://www.federalreserve.gov/FOMC/BeigeBook/2004/

Outlook: Business Confidence Up • Firms Still Not Hiring

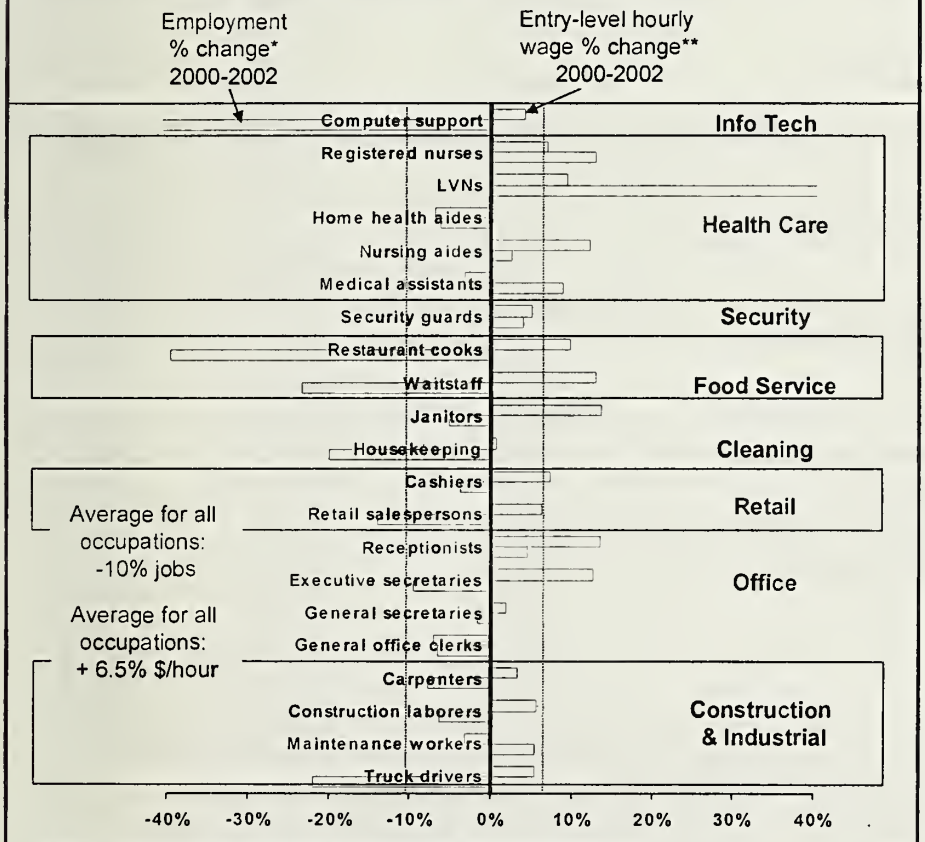
The second half of 2003 saw a noticeable up-tick in economic output nationally, which was reflected in improved confidence of local firms. In their quarterly survey of Bay Area executives, the Bay Area Council found that business confidence continued its climb, reaching an index value of 60 (a score greater than 50 reflects positive territory). Though business confidence is a precursor to employment gains, firms are still reluctant to hire. For instance, broad-based temporary hiring has not yet resumed despite anecdotal evidence that it may. The previous Quarterly Briefing explained that temp employment is a good predictor of future hiring trends, regardless of other issues temp employment may raise. Flat temp employment indicates a persisting reluctance of firms to hire – temporary and permanently. While most of the ingredients for employment growth are there – demand for final goods, confident businesses, available skilled workers – firms have been able to meet their demand by working their employees harder and more productively, and have not yet resumed hiring.

Special Feature: Occupations In-Demand

A recurring challenge for San Francisco's workforce development community is to identify occupations for which demand is not currently being met. In times of significant economic change, this task is particularly difficult. Short-term trends in employment and wages by occupation can shed light on this issue: above-average wage or employment gains generally indicate strong occupational demand. The attached chart shows the percent change in employment (blue) and entry-level wage (green) over the downturn for selected occupations in San Francisco. Overall, San Francisco MSA lost about 10% of its jobs and saw wage gains of 6-7% from 2000 to 2002. But the downturn did not hit all occupations the same. Several occupations actually gained jobs or had higher than average wage gains, or both, despite the downturn. The gains of registered nurses, LVNs, and nursing aids for instance, indicates a persistent strong demand for these occupations that remains unmet. By contrast, computer support specialists saw a tremendous drop in employment and meager wage gains, indicating oversupply relative to demand.

Food service occupations present a mixed picture – large employment losses were tempered by some wage gains. It is possible that the least-paid food service workers were let go, leaving fewer, but more highly skilled and

Employment and Wage Change for Selected Occupations
San Francisco, San Mateo, Marin Counties



** Percent change in number of workers employed in given occupation*
*** Percent change in the 25th-percentile hourly wage for all workers in given occupation*
SOURCE: California Employment Development Department (EDD)

paid workers behind. Within cleaning occupations, demand may have shifted from housekeeping to janitors, which saw particularly high wage gains. Similarly, office demand may have slightly shifted from general office clerks to receptionists, which experienced both significant employment and wage gains. Construction and retail occupations appear to track the overall economy, experiencing average employment losses and wage gains over the two years.

Detailed Statistics

Labor Force, Employment, and Unemployment for San Francisco County
(Obtained through monthly survey of San Francisco residents)
Not Seasonally Adjusted

	December 2002	December 2003	Change
Civilian Labor Force	415,300	416,500	1,200
Civilian Employment	387,700	394,600	6,900
Civilian Unemployment	27,500	21,900	-5,600
Unemployment Rate	6.6%	5.3%	-1.3%

Industry Employment for San Francisco MSA
(Obtained through monthly survey of employers in San Francisco, San Mateo, Marin)
Not Seasonally Adjusted

Broad Sector*, Industry (NAICS code)	December 2002	December 2003	Change
Information Technology	**36,400**	**34,100**	**-2,300**
Telecommunications (50-517000)	7,500	6,800	-700
ISPs, Portals and Data Processing (50-518000)	7,600	7,600	0
Computer Systems Design (60-541500)	21,300	19,700	-1,600
Corporate HQ and Services	**121,500**	**118,500**	**-3,000**
Advertising Services (60-541800)	6,700	6,400	-300
Other Media (50-51xxxx except above)	32,700	31,200	-1,500
Administrative Support Services (60-560000)	54,900	53,700	-1,200
Corporate Offices (60-550000)	27,200	27,200	0
Finance and Deal Making	**173,000**	**169,700**	**-3,300**
Legal Services (60-541100)	19,800	19,900	100
Accounting Services (60-541200)	8,300	8,400	100
Other Prof/Tech Services (60-54xxxx except above)	47,200	46,100	-1,100
Financial Activities (55-000000)	97,700	95,300	-2,400
Government, Health Education	**271,500**	**271,100**	**-400**
Government (90-000000)	134,100	130,300	-3,800
Health Care and Social Assistance (65-620000)	75,500	77,200	1,700
Educational Services (65-610000)	22,900	24,600	1,700
Other Services (80-000000)	39,000	39,000	0
Retail and Hospitality	**250,100**	**249,900**	**-200**
Arts, Entertainment, and Recreation (70-710000)	18,200	17,800	-400
Accommodation (71-721000)	22,500	22,600	100
Food Services and Drinking Places (71-722000)	69,300	69,600	300
Retail Trade (42-000000)	100,100	101,200	1,100
Transportation and Warehousing (43-400089)	40,000	38,700	-1,300
Industrial	**136,700**	**133,100**	**-1,400**
Wholesale Trade (41-000000)	29,200	29,700	500
Construction (15-230000)	43,700	42,800	-900
Manufacturing (30-000000)	49,100	48,100	-1,000
Utilities (43-220000)	8,000	8,100	100
TOTAL EMPLOYMENT	985,700	975,100	-10,600

** Broad sectors categorized by author*
Source: California Employment Development Department (http://www.calmis.ca.gov)

San Francisco's Labor Market *is released quarterly by WISF to inform the City's workforce and economic development community about short-term changes in San Francisco's economy and labor market. This and other research related to San Francisco's labor market, workforce development system, and economy can be found at http://www.picsf.org/research/research.htm. This report was written by Kevin Stange, Labor Market Research Analyst, who can be reached at kevin_stange@yahoo.com.*

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION FOR APPROVAL ONE STOP MOU WITH THE DEPARTMENT OF REHABILITATION AND CONTINUATION OF OTHER ONE STOP PARTNER MOUS (AGENDA ITEM 5A)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to approve the a One Stop Memorandum of Understanding between the Workforce Investment San Francisco Board and the California Department of Rehabilitation and extending the term of the existing One Stop Memoranda of Understanding for all other partners through June 30, 2004 for each of the One Stop locations at 3120 Mission, 1800 Oakdale, and 801 Turk with updated services matrices and cost sharing agreements to be attached when they are developed.

BACKGROUND

Section 121 (c) of the Workforce Investment Act reads: The local board, with the agreement of the chief local elected official, shall develop and enter into a memorandum of understanding (between the local board and the one-stop partners) concerning the operation of the one-stop delivery system in the local area. Each memorandum of understanding shall contain:

(A) provisions describing-
- (i) the services to be provided through the one-stop delivery system;
- (ii) how the costs of such services and the operating costs of the system will be funded;
- (iii) methods for referral of individuals between the one-stop operator and the one stop partners, for the appropriate services and activities;
- (iv) the duration of the memorandum and the procedures for amending the memorandum during the term of the memorandum; and
- (v) such other provisions, consistent with the requirements of WIA Title I, as the parties to the agreement determine to be appropriate.

The California Department of Rehabilitation was unable to adopt the One Stop partner MOU because certain language in their governing legislation, Title I of the Rehabilitation Act (see attached memorandum from Darlene Rutkowski dated November 26, 2003). After negotiations with representatives of the Department of Rehabilitation, a One Stop MOU was developed that closely parallels the other partner MOUs and meets all the provisions previously adopted while accommodating the language requirements of DOR. Attachment I contains the DOR MOU that highlights differences from the other partner MOUs.

On December 5, 2001 the One Stop Committee approved and on January 16, 2002 the Workforce Investment San Francisco Board ratified the MOU between the WISFB and the one-stop partners. Under section XVII:

> The partners agree that the terms of the MOU will take effect upon signature of the parties and was to continue in effect until June 30, 2003, or such time as any partner or partners will modify, extend, or terminate this MOU. Termination of the MOU will be effective in either of two situations:
>
> 1. all partners agree in writing to its termination; or
> 2. one of the partners receives written notification of termination from another partner.
>
> This MOU may be reviewed and renewed annually and modified, altered, or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties.

RECOMMENDATION

The attached DOR MOU be adopted (Attachment I) and the current other One Stop Partner MOUs be extended through June 30, 2004 (Attachment II) with the following changes:

1. The MOUs will apply to the One Stop sites at 3120 Mission, 1800 Oakdale and 801 Turk as appropriate.

2. A new Service Matrix (section IV) for each of the One Stop locations partner services will be completed by each partner and added to their MOU(s).

3. A cost sharing agreement identifying each partner's share One Stop center and system costs, as appropriate, will be completed by the WISFB Finance Subcommittee with the assistance of each partner and added to their MOU(s).

Attachment

Attachment I
Memorandum of Understanding
One-Stop San Francisco

I. References

Workforce Investment Act of 1998 (Act)

- Workforce Investment San Francisco Board [Section 117(a) of the Act]
- One-Stop San Francisco [Section 121of the Act]
- Full Service One-Stop Center [Section 134(c)(2)(A), Final Rule 662.100, Subsections (c), (d), and (e)]
- Full Service One-Stop Center signatory partners [Section 121(b)(1), Final Rule 662.230-66.260]
- One-Stop Operator Consortium [Designation of the Operator: Section 117 (d)(2)(A); Selection Process: Section 121(d)(2) and (e); Final Rule 662.420]

II. Introduction

This MOU is entered into in the spirit of cooperation and collaboration by the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board, hereafter referred to as "WISF Board", the One-Stop Operator Consortium [the Department of Human Services (DHS), Employment Development Department (EDD), National Council on Aging (NCOA), the Private Industry Council, Inc. (PIC), and the City College of San Francisco (CCSF)] , and the Full Service One-Stop Center signatory partners, hereafter referred to as "partners", to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers/businesses, through an integrated system of service delivery operated at one comprehensive site located at 3120 Mission Street, called the Full Service One-Stop Center, hereafter referred to as the "Center", and 40-plus satellite sites. It is understood that the development and implementation of the Full Service One-Stop Center will require mutual trust and teamwork between the partner agencies, all working together to accomplish shared goals, including customer satisfaction.

III. Strategic Vision for One-Stop San Francisco

The vision for One-Stop San Francisco, hereafter referred to as the "System", is to integrate current services in the Center and satellite sites to move toward providing universal access to career and labor market information and to provide other useful consumer information regarding training and education that enables the customers to make better informed choices.

IV. Services to be Provided At or Through the Full Service One-Stop Center

The following are the services that will be delivered consistent with each partner's program requirements at or through the Center. Additional matrices of services to be provided at the satellites are being developed and will be incorporated into this document as an addendum at a later date. The method for service delivery, the agency responsible for delivering those services, and the various funding resources that each will bring to the operation are listed below:

Core Service	Method for Service Delivery?	Service Provider	Funding Source
1. Determination of eligibility to receive assistance under Title I of WIA			
2. Outreach, intake, and orientation			
3. Initial assessment			
4. Job search and placement assistance, career counseling where appropriate			
5. Labor Market Information			
6. Provision of program performance information and program cost information			
7. Information on the performance of the local area and the One-Stop delivery system			
8. Information on the availability of supportive services in the local area and referral to such services as needed			
9. Information on filing and assistance with UI claims			
10. Assistance in establishing eligibility for WtW activities and financial aid assistance for other training and education programs available in the local area			
11. Follow-up services for 12 months for individuals participating in Title I funded activities placed in unsubsidized employment			

Partner Identified Core Services	Method for Service Delivery?	Service Provider	Funding Source
1.			
2.			

Intensive Services May include the following:	Method for Service Delivery?	Service Provider	Funding Source
1. Comprehensive and specialized assessment	~~☐Assessment for determining priority for services under Order of Selection~~ • ~~Comprehensive and specialized disability related assessments~~	~~Dept. of Rehab~~	
2. Development of an individual employment plan	~~Development of IPE~~	~~Dept. of Rehab~~	
3. Group counseling	~~Group Rehab counseling~~	~~Dept. of Rehab~~	
4. Individual counseling and career planning	~~☐VR counseling, guidance and referral services~~ • ~~Disability related counseling and career planning~~	~~Dept. of Rehab~~	
5. Case management for participants seeking training services	~~Case management~~	~~Dept. of Rehab~~	
6. Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training	~~Short term prevocational services~~	~~Dept. of Rehab~~	

Partner Identified Intensive Services	Method for Service Delivery?	Service Provider	Funding Source
Assessment to determine priority for services under Order of Selection	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Comprehensive and specialized disability related assessments	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Development of Individual Plan for Employment	Consumer/ Rehabilitation Counselor Collaboration	Dept. of Rehab	Rehabilitation Act Title I
Vocational rehabilitation counseling, guidance, case management, referral	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Disability related counseling/career planning	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Short term prevocational services	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Job search & placement assistance	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Physical & mental restoration services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Transportation services necessary to participate in intensive services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Services to family members	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Supported employment services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Rehab technology, including assistive technology and devices	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Job coaching	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Maintenance services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Post employment services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Personal assistance services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Homemaker services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Self employment services	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Other VR services determined necessary	~~Staff delivered~~Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I

Training Services May include:	Method for Service Delivery?	Service Provider	Funding Source
1. Occupational skills training			
2. On-the-job training			
3. Programs that combine workplace training with related instruction, which may include cooperative education programs			
4. Training programs operated by the private sector			
5. Skill upgrading and retraining			
6. Entrepreneurial training			
7. Job readiness training			
8. Adult education and literacy activities provided in combination with services described in numbers 1-7 above			
9. *Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training			

- Include competitive grants such as H-1B and W-t-W.

Partner Identified Training Services	Method for Service Delivery?	Service Provider	Funding Source
Assessment for determining training needs	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Vocational rehabilitation counseling, guidance and referral services related to training	Provided by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Vocational and other training services	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Physical and mental restoration services necessary to participate in training	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Transportation services necessary to participate in training	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Rehab technology needed to complete training	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Maintenance services related to training	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Personal assistance services related to training	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I
Other VR services related to training and determined necessary to achieve an employment outcome	Initiated by Rehabilitation Counselor	Dept. of Rehab	Rehabilitation Act Title I

V. Referral Process

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

1. Receive a written referral form with the date, time, reason for, and place of the appointment.
2. Receive scheduling for an appointment within three working days from the date of the referral.

B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

VI. Cost Allocation and Shared Costs

1. A cost allocation plan for the Full Service One Stop Center will be negotiated and developed in accordance with the Act as well as with OMB circulars A-21, A-87, A-110, ASMB C-10, and other Federal and State law and guidance as appropriate.
2. Plan(s) for cost allocation will be reviewed periodically and discussed between all parties. Modifications to the plan must be mutually agreed to in writing by all parties to the MOU.
3. The parties agree that joint application on behalf of the Center which result in an award, will benefit the Center overall and not the respective entity or entities applying for funds.

VII. Full Service One-Stop Center Performance Criteria

This MOU is an opportunity to provide guidance and direction to the partners. By including minimum levels of performance, the MOU becomes the vehicle through which the partners will be able to jointly monitor services against stated goals and performance measures to promote continuous improvement. One of the goals of the Act is to achieve mutually shared outcomes of those participants who receive services by multiple partners.

Therefore, it is agreed that the Center partners will strive to achieve the following standard of quality service for its customers, employees, and partners.

All customers will receive:

- Prompt and courteous service from the staff.
- Services designed to assist customers (both jobseekers and employers) in achieving their educational and/or employment goals.

All employees can expect to:

- Work in a safe and professional environment.
- Receive the tools necessary to achieve the desired outcome for their customers.

VIII. Governance of the One-Stop San Francisco

The accountability and responsibility for One-Stop San Francisco rests with the WISF Board. Accountability and responsibility for the organizational processes, services, and accomplishments for the Center will rest with the WISF Board, the One-Stop Operator Consortium, and the partners.

The WISF Board, in partnership with the Mayor of San Francisco, is responsible for setting policy for the portion of the statewide workforce investment system within One Stop San Francisco. This System includes the Full Service One-Stop Center, satellites, and any electronic or physical sites that provide information for services for access to workforce development activities within the San Francisco Workforce Investment Area. In addition, the WISF Board's responsibilities are to:

1. Develop and submit a local plan.
2. Select the One-Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998, Section 117 (d)(2)(A); Final Rule Section 662.410.
3. Develop a budget for the purpose of carrying out the duties of the WISF Board.
4. Conduct oversight with respect to local programs of youth activities authorized under section 129, local employment and training activities authorized under section 134, and the local Workforce Investment System.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One-Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One-Stop San Francisco.
11. Collaborate with the One-Stop Operator Consortium in developing and maintaining the One-Stop San Francisco technology links.

The One-Stop Committee, as a standing committee of the WISF Board, will recommend policy to the WISF Board regarding operations and delivery of services through the Center.

The One-Stop Operator Consortiums' responsibilities are limited to the Center and include:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
4. Assuring cross-training and capacity building for all partners;
5. Assisting with the development of established performance outcomes; including customer satisfaction outcomes for both employers and job-seekers;
6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
8. Oversight of the MOUs on behalf of the WISF Board,
9. Providing recommendations for Center funding to the WISF Board;
10. Managing the Center budget;
11. Convening the partners to implement a continuous improvement process for service delivery in the Center;
12. Coordinating seamless service delivery;
13. Implementing a coordinated employer outreach and marketing effort as provided by available funds;
14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.

The Partner responsibilities will be to:

❑ Provide services as outlined in this MOU and to coordinate and cooperate with the One-Stop Operator Consortium in the day-to-day delivery of services at the Center and with PIC, Inc. for the required administrative activities within the One Stop San Francisco to extent not inconsistent with the laws and policies governing the partners program or services.

IX. Agreements

It is mutually agreed and understood by and between the parties that:

1. This MOU is neither a fiscal nor a fund obligation document. Specific studies, activities, programs or projects that involve the transfer or expenditure by any party of any money, services, or property will require execution of separate agreements or contracts. Each subsequent agreement or arrangement involving the transfer of money, services or property between the parties to this MOU must comply with all applicable statutes and regulations.

2. This MOU shall be governed by and construed in accordance with the laws of the federal government and the State of California and, as appropriate, shall also be governed by the laws of the City and County of San Francisco and the policies of the WISF Board.
3. During the performance of the MOU, the parties shall not discriminate against any person because of age, race, color, religious or political affiliation, sex, national origin, ancestry, physical or mental disability, medical condition, marital status, veteran, or sexual orientation.
4. The partners agree that policies and procedures established under this MOU and programs and services provided at the Center will comply with the Americans with Disability Act.
5. This MOU in no way restricts any of the parties from participating in similar activities or arrangements with other public or private agencies, organizations or individuals.
6. Parties may place WISF Board approved signage on the Center exterior to identify partner presence. The parties agree to utilize the One Stop San Francisco logo on the building identified for Center usage, letterhead, envelopes, business cards, and any written correspondence and fax transmittals as appropriate. A list of all participating partners will be posted prominently at each site respectively.
7. Parties agree to utilize, to the maximum extent possible, CalJOBS, the State Labor Exchange, as an electronic job matching system within the One Stop San Francisco.

X. Independent Agency Status

It is expressly understood and agreed that this MOU is not intended and shall not be construed to create the relationship of agent, servant, employee, partnership, joint venture or association between parties. Each party will be responsible for providing its own salaries, payroll taxes, withholding, insurance, workers' compensation coverage and other benefits of any kind, as required by law, for its own employees. Individual contracts and agreements between partners are not affected by and do not affect this MOU.

XI. Method for Dispute Resolution

The parties agree to try to resolve policy or practice disputes at the lowest level starting with the staff supervisor. If issues cannot be resolved at this level, they shall be referred to the Center Manager and respective staff employer for discussion and resolution. If issues cannot be resolved at this level, they shall be referred to the One-Stop Operator Consortium for discussion and resolution. If issues cannot be resolved at this level, a third party dispute resolution specialist may be called in to help mediate any disputes. Informal mediation services, however, shall be explored prior to any other formal or legal process. Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

The parties agree to recognize and comply with applicable labor agreements affecting represented employees located in the Center and satellite sites. This shall include the right of access by labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.39 [commencing with section 3512] of Division 4 of Title I of the Government Code).

The One Stop Operator Consortium and the partners shall cooperate as appropriate and according to partner procedures in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning partner employees and partner employee misconduct.

If the methods described above fail to result in a resolution, the parties involved in the dispute shall first seek third-party mediation. .

XII. Confidentiality

It is the intention of the partners to develop systems to share information throughout One Stop San Francisco. In the initial stages, client information will be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of applicable state and federal laws and regulations.

XIII. Termination

The parties understand that implementation of the MOU is dependent on everyone's good faith effort to work together to improve services to the community. The parties also agree that this is a project where different ways of working together and providing services are being tried. In the event that it becomes necessary for one or more parties to cease being a party to this MOU, that said party(ies) shall notify all other parties, in writing, ninety (90) days in advance of that intention. The other parties shall then determine how to replace or offset the loss of participation and resources to the Center. Termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

XIV. Insurance

Each party hereto acknowledges and understands that the State of California has elected to be insured for its general liability through a self-insurance program. Departments of the State of California are covered by a self-insurance plan for general liability administered by the California Department of General Services, Office of Risk and Insurance Management. All other parties agree to maintain in full force and effect during the term of the MOU and any extension thereof, commercial general liability insurance, or self-insurance, with limits of not less than $1,000,000 single limit coverage per occurrence for bodily injury, personal injury and property damage. Upon request from any other party, a party shall provide an appropriate certificate evidencing such insurance, or self-insurance, to the requesting party.

XV. Site Supervision

The Center Manager will be accountable and responsible to the One Stop Operator Consortium for the day-to-day operation and coordination of services and partner staff assigned to the Center.

Partner staff that is located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil service or other employment rights and responsibilities. Partner staff, including state employees, performing services at the Center and satellites shall retain existing personnel, civil service and collective bargaining protections on matters related to employment, including but not limited to, hiring, promotion, discipline, and grievance procedures.

XVI. Hours of Operation

The minimum hours of operation of the Center will be Monday through Friday, 8:00 a.m. to 5:00 p.m. All staff will comply with the holiday schedule of their primary employer and will provide a copy of their holiday schedule to the Center Manager at the beginning of each calendar year.

XVII. Duration and Modification of the MOU

The ~~partners~~ parties agree that the terms of the MOU will take effect ~~upon signature of both parties~~on July 1, 2003 and will continue in effect until June 30, ~~2003~~2006, or such time as any ~~partner~~ party or ~~partners~~ parties will modify, extend or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. All ~~partners~~ parties agree in writing to its termination; or
2. One of the ~~partners~~ parties receives written notification of termination from another ~~partner~~party.

This MOU may be extended by written agreement between the WISF Board and the Department of Rehabilitation (DOR), provided such agreement is signed by both parties prior to the termination date of this agreement, and contains the following:

- A statement of intent to continue all provisions of the MOU,
- Revised effective and termination dates, and
- Dated signature of the District Administrator on behalf of DOR and of a person authorized to sign on behalf of the WISF Board.

This MOU may be ~~reviewed and renewed annually and~~ modified~~, altered,~~ or revised, as necessary, by mutual consent of all parties~~,~~ through the issuance of a written amendment~~,~~ signed and dated by all parties. This MOU constitutes the entire agreement between the parties hereto and no oral understanding not incorporated herein shall be binding on any of the parties hereto.

Memorandum of Understanding
One Stop San Francisco

SIGNATURES

In WITNESS THEREOF, the parties to this MOU execute this agreement.

Dated: ________, ~~2001~~2003

BY: ____________________
(Signature of Authorized Officer)

____
Willie L. Brown, Jr.
Mayor

____
City and County of San Francisco

____
1 Dr. Carlton B. Goodlett Place, Room 200

____
San Francisco, CA 94102-4681

____
(Legal Name of Party)

Dated: ________, ~~2001~~2003

BY: ____________________
(Signature of Authorized Officer)

____
Lynn Bunim,
Chairperson, WISF Board

____
Workforce Investment San Francisco Board

____
745 Franklin Street, Suite 200

____
San Francisco, CA 94102

____
(Legal Name of Party)

Memorandum of Understanding
One Stop San Francisco

Dated: ________, ~~2001~~2003

BY: ________________________
(Signature of Authorized Officer)

____
Darlene Rutkowski, District Administrator

____
Department of Rehabilitation

____
185 Berry Street, Lobby 7 #180

____
San Francisco, CA 94107

____
(Legal Name of Party)

Attachment II
Memorandum of Understanding
One Stop San Francisco

I. References

Workforce Investment Act of 1998 (Act)

- Workforce Investment San Francisco Board [Section 117(a) of the Act]
- One-Stop San Francisco [Section 121of the Act]
- Full Service One-Stop Center [Section 134(c)(2)(A), Final Rule 662.100, Subsections (c), (d), and (e)]
- Full Service One-Stop Center signatory partners [Section 121(b)(1), Final Rule 662.230-66.260]
- One-Stop Operator Consortium [Designation of the Operator: Section 117 (d)(2)(A); Selection Process: Section 121(d)(2) and (e); Final Rule 662.420]

II. Introduction

This MOU is entered into in the spirit of cooperation and collaboration by the Mayor of the City and County of San Francisco, the Workforce Investment San Francisco Board, hereafter referred to as "WISF Board", and the Full Service One-Stop Center signatory partners, hereafter referred to as "partners", to describe how their various funding streams and resources will be utilized to better serve their mutual customers, both job seekers and employers/businesses, through an integrated system of service delivery operated at one comprehensive site located at 3120 Mission Street, called the Full Service One-Stop Center, hereafter referred to as the "Center", and 40-plus satellite sites. It is understood that the development and implementation of the Full Service One-Stop Center will require mutual trust and teamwork between the partner agencies, all working together to accomplish shared goals, including customer satisfaction.

III. Strategic Vision for One-Stop San Francisco

The vision for One-Stop San Francisco, hereafter referred to as the "System", is to integrate current services in the Center and satellite sites to move toward providing universal access to career and labor market information and to provide other useful consumer information regarding training and education that enables the customers to make better informed choices.

IV. Services to be Provided At or Through the Full Service One-Stop Center

The following are the services that will be delivered at or through the Center. Additional matrices of services to be provided at the satellites are being developed and will be incorporated into this document as an addendum at a later date. The method for service delivery, the agency responsible for delivering those services, and the various funding resources that each will bring to the operation are listed below:

Core Service	Method for Service Delivery?	Service Provider	Funding Source
1. Determination of eligibility to receive assistance under Title I of WIA			
2. Outreach, intake, and orientation			
3. Initial assessment			
4. Job search and placement assistance, career counseling where appropriate			
5. Labor Market Information			
6. Provision of program performance information and program cost information			
7. Information on the performance of the local area and the One-Stop delivery system			
8. Information on the availability of supportive services in the local area and referral to such services as needed			
9. Information on filing UI claims			
10. Assistance in establishing eligibility for WtW activities and financial aid assistance for other training and education programs available in the local area			
11. Follow-up services for 12 months for individuals participating in Title I funded activities placed in unsubsidized employment			

Partner Identified Core Services	Method for Service Delivery?	Service Provider	Funding Source
1.			
2.			
3.			

Intensive Services May include the following:	Method for Service Delivery?	Service Provider	Funding Source
1. Comprehensive and specialized assessment			
2. Development of an individual employment plan			
3. Group counseling			
4. Individual counseling and career planning			
5. Case management for participants seeking training services			
6. Short-term prevocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training			
Partner Identified Intensive Services	**Method for Service Delivery?**	**Service Provider**	**Funding Source**

Training Services May Include	Method for Service Delivery?	Service Provider	Funding Source
1. Occupational skills training			
2. On-the-job training			
3. Programs that combine workplace training with related instruction, which may include cooperative education programs			
4. Training programs operated by the private sector			
5. Skill upgrading and retraining			
6. Entrepreneurial training			
7. Job readiness training			
8. Adult education and literacy activities provided in combination with services described in numbers 1-7 above			
9. *Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training			
Partner Identified Training Services	**Method for Service Delivery?**	**Service Provider**	**Funding Source**

* Include competitive grants such as H-1B and W-t-W.

V. Referral Process

The methods of referral are not yet in place, however, the Partners acknowledge responsibility and commit to address this issue in the following manner:

It is agreed that the partners of this signed MOU will conduct referral for services in the following manner.

A. All customers referred for services will:

1. Receive a written referral form with the date, time, reason for, and place of the appointment.
2. Receive scheduling for an appointment within three working days from the date of the referral.

B. The process for implementation is a work in progress and will be determined, reviewed and evaluated for continuous improvement.

VI. Cost Allocation and Shared Costs

1. A cost allocation plan for the Full Service One Stop Center will be negotiated and developed in accordance with the Act as well as with OMB circulars A-21, A-87, A-110, ASMB C-10, and other Federal and State guidance as appropriate.
2. Plan(s) for cost allocation will be reviewed periodically and discussed between all parties. Modifications to the plan must be mutually agreed to in writing.
3. The parties agree that joint application on behalf of the Center which result in an award, will benefit the Center overall and not the respective entity or entities applying for funds.

VII. Full Service One-Stop Center Performance Criteria

This MOU is an opportunity to provide guidance and direction to the partners. By including minimum levels of performance, the MOU becomes the vehicle through which the partners will be able to jointly monitor services against stated goals and performance measures to promote continuous improvement. One of the goals of the Act is to achieve mutually shared outcomes of those participants who receive services by multiple partners.

Therefore, it is agreed that the Center partners will strive to achieve the following standard of quality service for its customers, employees, and partners.

All customers will receive:

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- ☐ Services designed to assist customers (both jobseekers and employers) in achieving their educational and/or employment goals.

All employees can expect to:

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1. Develop and submit a local plan.
2. Select the One-Stop Operator Consortium as prescribed in the Workforce Investment Act of 1998, Section 117 (d)(2)(A); Final Rule Section 662.410.
3. Develop a budget for the purpose of carrying out the duties of the WISF Board.
4. Conduct oversight with respect to local programs of youth activities authorized under section 129, local employment and training activities authorized under section 134, and the local Workforce Investment System.
5. Negotiate local performance measures.
6. Assist the Governor in developing the statewide employment statistics system.
7. Coordinate the workforce investment activities with economic development strategies and develop other employer linkages with such activities.
8. Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, of connecting, brokering, and coaching activities, through intermediaries such as the One-Stop Operator Consortium or through other organizations, to assist such employers in meeting hiring needs.
9. Adopt a Business Services Vision and strategic plan.
10. Develop a marketing strategy to promote the One-Stop San Francisco.
11. Collaborate with the One-Stop Operator Consortium in developing and maintaining the One-Stop San Francisco technology links.

The One-Stop Committee, as a standing committee of the WISF Board, will recommend policy to the WISF Board regarding operations and delivery of services through the Center.

The One-Stop Operator Consortiums' responsibilities are limited to the Center and include:

1. Ensuring, at a minimum, provision of core/universal services, availability of intensive services, and access to training services;
2. Assuring the integrated participation of the partner agencies;
3. Establishing common systems and procedures at the Center;
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6. Recommending policy changes to the WISF Board;
7. Assuring accountability to the WISF Board for terms of the One Stop Operator Consortium/WISF Board agreement;
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9. Providing recommendations for Center funding to the WISF Board;
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12. Coordinating seamless service delivery;
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14. Recommending a design/delivery system for employer/business services, including gathering input from the business community and clarification about how such services will be accessed; and
15. With the WISF Board, developing and maintaining the system's technology links.
16. Determining how all the entities who participate in the Full Service One Stop Center can be involved in discussion and decision making for the operation and delivery of services at 3120 Mission Street.
17. Striving to inform and solicit input from all participating Center partners.
18. Ensuring that reasonable efforts will be made to insure the safety and security of all customers and staff.

The Partner responsibilities will be to:

- ☐ Provide services as outlined in this MOU and to coordinate and cooperate with the One-Stop Operator Consortium in the day-to-day delivery of services at the Center and with PIC, Inc. for the required administrative activities within the One Stop San Francisco.

IX. Agreements

It is mutually agreed and understood by and between the parties that:

1. This MOU is neither a fiscal nor a fund obligation document. Specific studies, activities, programs or projects that involve the transfer or expenditure by any party of any money, services, or property will require execution of separate agreements or contracts. Each subsequent agreement or arrangement involving

the transfer of money, services or property between the parties to this MOU must comply with all applicable statutes and regulations.

2. This MOU shall be governed by and construed in accordance with the laws of the federal government and the State of California and shall also be governed by the laws of the City and County of San Francisco and the policies of the WISF Board.
3. During the performance of the MOU, the parties shall not discriminate against any person because of age, race, color, religious or political affiliation, sex, national origin, ancestry, physical or mental disability, medical condition, marital status, veteran, or sexual orientation. The parties also agree to abide by the provision of Executive Order 11246 on nondiscrimination and, accordingly, will take affirmative action to ensure that applicants are employed without regard to their age, race, ancestry, creed, color, religious or political affiliation, sex, physical or mental disability, medical condition, national origin, sexual orientation or marital status.
4. The partners agree that policies and procedures established under this MOU and programs and services provided at the Center will comply with the Americans with Disability Act.
5. This MOU in no way restricts any of the parties from participating in similar activities or arrangements with other public or private agencies, organizations or individuals.
6. Parties may place WISF Board approved signage on the Center exterior to identify partner presence. The parties agree to utilize the One Stop San Francisco logo on the building identified for Center usage, letterhead, envelopes, business cards, and any written correspondence and fax transmittals as appropriate. A list of all participating partners will be posted prominently at each site respectively.
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The parties agree to try to resolve policy or practice disputes at the lowest level starting with the staff supervisor. If issues cannot be resolved at this level, they shall be referred to the Center Manager and respective staff employer for discussion and resolution. If issues cannot be resolved at this level, they shall be referred to the One-Stop Operator Consortium for discussion and resolution. If issues cannot be resolved at this level, a third party dispute resolution specialist may be called in to help mediate any disputes.

Informal mediation services, however, shall be explored prior to any other formal or legal process. Prior to any matter being pursued through legal process, the dispute will be presented to the WISF Board for review and assistance in resolving.

The parties agree to recognize and comply with applicable labor agreements affecting represented employees located in the Center and satellite sites. This shall include the right of access by labor organization representatives pursuant to the Ralph C. Dills Act (Chapter 10.39 [commencing with section 3512] of Division 4 of Title I of the Government Code).

The One Stop Operator Consortium and the partners shall cooperate as appropriate and according to partner procedures in the investigation of the following matters: discrimination under the California Fair Employment and Housing Act (Part 2.8 [commencing with Section 12900] of Division 3 of Title 2 of the Government Code), threats and/or violence concerning partner employees and partner employee misconduct.

If the methods described above fail to result in a resolution, the parties involved in the dispute shall first seek mediation, and as a final method, seek arbitration services at the expense of the respective parties.

XII. Confidentiality

It is the intention of the partners to develop systems to share information throughout One Stop San Francisco. In the initial stages, client information will be shared solely for the purpose of enrollment, referral or provision of services. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies of applicable state and federal laws and regulations.

XIII. Termination

The parties understand that implementation of the MOU is dependent on everyone's good faith effort to work together to improve services to the community. The parties also agree that this is a project where different ways of working together and providing services are being tried. In the event that it becomes necessary for one or more parties to cease being a party to this MOU, that said party(ies) shall notify all other parties, in writing, ninety (90) days in advance of that intention. The other parties shall then determine how to replace or offset the loss of participation and resources to the Center. Termination by one or more of the parties to this MOU does not alter the terms or obligations of the other parties to this MOU.

XIV. Insurance

Each party hereto acknowledges and understands that the State of California has elected to be insured for its general liability through a self-insurance program. Departments of the State of California are covered by a self-insurance plan for general liability administered by the State Attorney General's Office. All other parties agree to maintain in full force and effect during the term of the MOU and any extension thereof, commercial general liability insurance, or self-insurance, with limits of not less than $1,000,000 single limit coverage per occurrence for bodily injury, personal injury and property damage. Upon request from any other party, a party shall provide an appropriate certificate evidencing such insurance, or self-insurance, to the requesting party.

XV. Site Supervision

The Center Manager will be accountable and responsible to the One Stop Operator Consortium for the day-to-day operation and coordination of services and partner staff assigned to the Center. The Center Manager may have lead responsibility over partner staff, to the extent of assigning and reviewing work.

Partner staff that is located at the Center shall remain under the supervision of their employing department for the purposes of performance evaluation and other matters concerning civil service or other employment rights and responsibilities. Partner staff, including state employees, performing services at the Center and satellites shall retain existing personnel, civil service and collective bargaining protections on matters related to employment, including but not limited to, hiring, promotion, discipline, and grievance procedures.

XVI. Hours of Operation

The minimum hours of operation of the Center will be Monday through Friday, 8:00 a.m. to 5:00 p.m. All staff will comply with the holiday schedule of their primary employer and will provide a copy of their holiday schedule to the Center Manager at the beginning of each calendar year.

XVII. Duration and Modification of the MOU

The partners agree that the terms of the MOU will take effect upon signature of both parties and will continue in effect until June 30, 2004, or such time as any partner or partners will modify, extend, or terminate this MOU. Termination of the MOU will be effective in either of two situations:

1. All partners agree in writing to its termination; or
2. One of the partners receives written notification of termination from another partner.

This MOU may be reviewed and renewed annually and modified, altered, or revised, as necessary, by mutual consent of all parties, through the issuance of a written amendment, signed and dated by all parties. Ratification of the request by all the other partners will constitute the modification in question. This MOU constitutes the entire agreement between the parties hereto and no oral understanding not incorporated herein shall be binding on any of the parties hereto.

Memorandum of Understanding
One Stop San Francisco

SIGNATURES

In WITNESS THEREOF, the parties to this MOU execute this agreement.

Dated: _________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
Willie L. Brown, Jr.
Mayor

____
City and County of San Francisco

____
1 Dr. Carlton B. Goodlett Place, Room 200

____
San Francisco, CA 94102-4681

____
(Legal Name of Party)

Dated: _________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
Lynn Bunim,
Chairperson, WISF Board

____
Workforce Investment San Francisco Board

____
745 Franklin Street, Suite 200

____
San Francisco, CA 94102

____
(Legal Name of Party)

Memorandum of Understanding
One Stop San Francisco

Dated: _________, 2001

BY: ________________________
(Signature of Authorized Officer)

____
(Name and Title of Authorized Officer)

____
(Agency or Organization)

____
(Address)

____
(City, State, Zip Code)

____
(Legal Name of Party)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

DRAFT MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: PROPOSED ADOPTION OF THE "INNOVATIONS" FROM THE DRAFT BUSINESS PLAN FOR WORKFORCE INVESTMENT SAN FRANCISCO'S ONE STOP CAREER CENTER SYSTEM (AGENDA ITEM 5B)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to review and approve the recommended "innovations" from the draft Business Plan for the San Francisco One Stop Career Center System January '04 – January '06. These eight "innovations", or operating principles, will serve as the foundation for the future efforts, as the One Stop Committee and Employer Services Committees work to determine what actions should occur related to the approved "innovations".

BACKGROUND

At its Board Retreats of both 2002 and 2003, the WISF Board explicitly stated as a goal, "establishing a state-of-the art One Stop." Following the August 1, 2003 Retreat, which focused exclusively on the local One Stop system, Chair Rosalie Bulach resolutely committed to the development of a One Stop business plan by December 31, 2003 and instructed staff to immediately begin drafting a business plan for the One Stop Career Center System.

Since then, from September to December 2003, the WISF Board's One Stop Committee (as the planning and oversight committee for the local One Stop Career Center System) has guided the work of developing the business plan. Highlights of this process include:

- September 15, 2003 – Business Plan outline was presented at a joint meeting of the One Stop and Employer Services Committee, and subsequently reported to the full WISF Board through the Sept.15th Joint Committee Report
- November 17, 2003 – Staff presented a detailed "walk-through" of the first draft of business plan for discussion at a One Stop Committee meeting
- December 1, 2003 – One Stop Committee Chair Rosalie Bulach distributed a letter to all WISF Board and Committee members informing them of the draft Plan and urging their involvement in the planning process
- November 19, 2003 – Staff provided overview of draft Plan, invited participation from the community, and answered questions at monthly CCA (Committee of Community Agencies) meeting
- December 1, 2003 - Second version of the draft Plan mailed and posted for upcoming One Stop Committee meeting
- December 3, 2003 – Staff provided status report and participated in discussion about the draft Business Plan at Consortium Operator Directors Committee meeting
- December 8, 2003 – One Stop Committee meeting, The quorum Committee:

- → Reviewed and discussed second version of draft Plan and supporting citations from WISF Retreats '02 and '03, SF's Strategic Five Year Plan, the Workforce Investment Act of '98, and provisions from House and Senate-passed bills on WIA reauthorization;
  - → Set deadline date of December 15th for receiving final comments about the draft Plan for consideration at a joint meeting of the One Stop and Employers Services Committees on Jan.5th;
  - → Designated working group of Committee members to synthesize comments and propose next steps at the Jan. 5th meeting.
- December 12-16, 2003 – Staff received comments concerning the draft Plan from the following parties:
  1. Department of Human Services – received Dec. 12, 2003
  2. John Poremba, (Employment Development Dept.) – Dec. 16, 2003
  3. Phyllis McGuire (City College of San Francisco) – Dec, 15, 2003
  4. Devra Edelman (Haight Ashbury Food Program, CCA,/Access Point Collaborative) – Dec.16, 2003
  5. Dan Brakovich (Mission Language and Vocational School) – Dec. 15, 2003
  6. Darlene Rutkowski (Dept. of Rehabilitation) – Dec. 14-15, 2003
  7. Gwen Henry (Florence Crittendon Services) – Dec.15, 2003
  8. Lisa Stringer (Supportive Housing Employment Collaborative) – Dec.15, 2003
- December 17, 2003 – Staff presented overview of draft Plan to Employer Services Committee for discussion and incorporates feedback into planning process
- December 23, 2003 – Working group comprised of designated One Stop Committee members and staff meet to synthesize feedback
- January 5, 2004 – Staff recommended approval of draft Plan to both One Stop and Employer Services Committees at joint meeting

  The following meeting materials were mailed and publicly posted in advance of the meeting:
  1. A third draft of the Business Plan, with new text that included:
     - Proposed workgroup revisions to language in the draft Plan, as agreed upon by the working group;
     - Excerpts from the comments received that referenced specific sections in the Plan and that proposed alternate language
  2. Two documents that the workgroup propose be attached to the draft Plan to help provide additional information for the draft Plan, as follows:
     - *Working Definitions and Concepts*, adopted by the WISF Board, Sept. '03
     - Excerpt from the Workforce Investment Act of '98, defining One Stop partners
  3. Copies of original comments received December 12 - 16, as listed above.

THE REVISIONS TO THE DRAFT PLAN

At the One Stop Committee meeting on Jan. 5th, the entire meeting was spent discussing the draft Plan, beginning with a report from the workgroup designated to synthesize the feedback and to recommend next steps. While acknowledging that given the limited time given for this process, Committee members who participated felt satisfied with the proposed edits. Furthermore, workgroup member John Poremba reported that he had conducted a side-by-side review of both the draft Plan and the S.F. Strategic Five Year Plan and found that, in his opinion, there was nothing in the draft Plan that goes against the Strategic Five-Year Plan.

In the discussion that followed, no substantive criticisms were made of the content being proposed in the draft Plan. However, some members had concerns about the process used for drafting the Plan and felt that more opportunities for participation should be provided. The Joint Committee membership then voted to approve the eight "innovations" as they currently existed in the draft Plan, and to consider feedback from other key stakeholders and community groups before approving the goals and objectives related to the full implementation of the "innovations". Therefore, in addition to the "innovations", the revised draft Plan has also been included to help inform your discussion at the meeting.

RECOMMENDATION

It is recommended that the Workforce Investment San Francisco Board review and approve the attached eight "Innovations" from the draft Business Plan '04-'06 for San Francisco's One Stop Career Center System.

Staff will be available at the meeting on February 18th to respond to your questions.

Attachment

2004 INNOVATIONS

San Francisco One Stop Career Center System
BUSINESS PLAN '04 –'06
(ADOPTED BY WISF EXECUTIVE COMMITTEE ON JANUARY 14, 2004)

1. The WISF Board reviews and provides comments concerning the budgets of those partner funding sources identified in the WIA and other appropriate partners, in support of the challenge to maximize coordination of pubic workforce development efforts, deploy resources with integrity, and invest wisely and strategically.

2. The WISF Board reviews and provides comments on the plans of One Stop partner programs, as identified in the WIA, in response to the challenge of designing services based on objective market research and customer needs.

3. The WISF Board establishes clear standards and expectations for operating One Stop Centers, requires evidence of met expectations from the Operator(s), and evaluates options for future designation of One Stop Center Operator(s).

4. The System creates a relevant, employer-friendly capacity for an information and referral system for employer services, employing "central point of contact" and "system navigator" concepts.

5. The System establishes an income-producing division of One Stop system, based on a fee-for-service concept.

6. The System maximizes informed customer choice by providing complete information about the full range of services and financial assistance available.

7. The System launches unified and comprehensive marketing campaign to inform and attract diverse customer segments.

8. The System matches the individual customer need with appropriate service tier and service funding source to optimize customer outcomes and maximize resources.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: STRATEGIC PRIORITIES FOR THE SAN FRANCISCO YOUTH COUNCIL (AGENDA ITEM 5C)

ACTION REQUESTED

Adopt the Draft Strategic Priorities for the San Francisco Youth Council with the additions listed below as the vision, conditions, mission/purpose, and primary and supportive strategies to guide the Youth Council's investment of WIA youth funds and policy development.

BACKGROUND

The Workforce Investment Act challenges local communities, through the Youth Council, to establish a collaboration that brings together schools, community organizations, training providers and others to create a comprehensive and cohesive youth assistance strategy.

Beginning October 2002 the Youth Council began a strategic planning process to create a unifying strategy for youth services in San Francisco. That process included the presentation and discussion of the needs of youth from a wide range of perspectives, the presentation and discussion of the results of a youth resources mapping project, and the appointment of a workgroup to plan build a framework for an all-day planning retreat. The Youth Council retreat was held on August 28, 2003 to discuss vision, mission and service priorities. The retreat resulted in the Draft Strategic Priorities document that was discussed at the October 23, 2003 Youth Council meeting with refinements suggested and a community vetting process requested.

Community vetting meetings were held on December 3 for PIC youth subcontractors, on December 10 in the Mission District, on December 12 in Bayview Hunters Point, and on December 16 at the Youth Allies Dialogue meeting. At each meeting the roles and responsibilities of the Youth Council were discussed, the Strategic Priorities reviewed and vetting questions were asked. PIC staff recorded comments to the Strategic Priorities and responses to the attached vetting questions. Those comments and responses were presented to the Youth Council at their January 8, 2004 meeting.

The Youth Council discussed the community vetting input, adopted the draft plan and instructed staff to incorporate the following concepts, based on that input:

- Affirm targeting in draft plan and clarify definition of at-risk youth to focus on youth that have dropped out of school, those in-school but not on track to graduate, youth in the juvenile justice and foster care systems, and pregnant and parenting teens
- Emphasize high school completion and employment preparation
- Set Higher standards for educational outcomes and employment opportunity
- Structure multi-year funding for service providers

- Increased youth involvement in program design, operations, oversight and evaluation
- Clarify youth development as an approach not a service
- Incorporate expansive definition of collaboration to facilitate comprehensive services approach
- Increase parental involvement where appropriate
- Ensure culturally competent programming

RECOMMENDATION

The Executive Committee recommends that the Workforce Investment San Francisco Board ratify the attached Draft Strategic Priorities for the San Francisco Youth Council and direct staff to incorporate the community input noted above, develop a blueprint for action and related Request for Proposals and selection criteria consistent with those priorities for Youth Council review and approval.

STRATEGIC PRIORITIES FOR THE SAN FRANCISCO YOUTH COUNCIL

(**Note:** Format is designed to provide a context and a set of critical questions for key stakeholders to respond to. After input is gathered adjustments will be made and incorporated into a blueprint for action.)

OUR VISION: ALL YOUTH – ONE SYSTEM

The Workforce Investment Act challenges local communities, through the Youth Council, to establish a collaboration that brings together school, community organizations, training providers and others to create a comprehensive and cohesive youth service system.

The San Francisco Workforce Investment Board Youth Council is outlining a strategic plan for the future and believes the strategies should build on a youth development framework:[1]

Subcontractors 12/3/03	The San Francisco Workforce Investment Board Youth Council is outlining a strategic plan for the future and believes ~~[the]~~ ***that employment and education*** strategies should build on a youth development framework
Allies Dialogue 12/16/03	*What is the timeframe for the overall plan (5 years, 2 years)?*

- viewing young people and families as partners, rather than clients and involving them in designing and delivering programs and services;
- giving all youth access to both prevention and intervention services and programs that meet their developmental needs; and
- offering youth opportunities to develop relationships with caring, supportive adults.

Subcontractors 12/3/03	offering youth ***employment and education*** opportunities to develop relationships with caring, supportive adults. *How do you measure 'relationship building'?* *There is a need for employers to be at the table as part of this strategic planning process. Bring organizations like UC San Francisco, Mt. Zion Hospital, PG&E, into this discussion.*

Youth Development is the ongoing process in which all young people are engaged and invested while attempting to meet their basic personal and social needs and to build competencies necessary for successful adolescent and adult life. It is an approach, framework, and a way to think about young people that focus on their capacities, strengths and developmental needs, rather than on their weaknesses and problems. All young people have basic needs that are critical to survival and healthy development. These needs include but may not be limited to:

- a sense of safety and structure;
- belonging and membership;
- self-worth and ability to contribute;
- independence and control over one's life;

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[1] This framework and approach to youth development comes from *Developing the WIA Youth Request for Proposals: A Technical Assistance Tool for WIB Staff* developed by the RFP Topical Study Group of the 2002-03 class of the National Youth Employment Coalition's WIA Leaders Academy.

- closeness and several good relationships; and
  competency and mastery.

At the same time, to succeed as adults, all youth must acquire positive attitudes and appropriate behaviors and skills in six areas:

* health
* personal/social
* knowledge
* reasoning and creativity
* vocation
* citizenship

Basic Youth Development Principles
Employment and education researchers and practitioners in the youth field believe that they have identified the basic principles directly related to the 10 WIA elements that help build effective programs for youth. They believe that the importance of integrating the following principles into the design of youth programs cannot be underestimated.

Allies Dialogue 12/16/03	*Could the Youth Council support bi-lingual education?* *Could the Youth Council encourage bi-lingual education?*

Adult Support/Caring and Knowledgeable Adults
Effective youth initiatives connect young people with adults who care about them and who serve as role models.

Structure and Expectations
Youth interventions must set clear and high expectations for young people while carefully supporting each young person so they can attain them.

Creative Forms of Learning
Learning should be engaging and relevant, with curricula and teaching strategies that are creative, substantive, and attuned to the learners and to provide effective pathways to finish high school, or move into post secondary training or employment.

Holistic Approach
Treating individual holistically may provide sufficient protective factors to overcome a variety of risk factors, thus preventing one or more of the many behavioral indications of deeper problems manifested by young people.

Youth as Resources
Programs should move away from focusing on eliminating youth deficits to supporting youth assets.

Implementation Quality
Programs clearly work better when they are thought through and well managed.

Follow-up Services
Programs offering services over a long period of time, possibly many years, foster trust in youth because there is time to develop relationships with caring, knowledgeable adults.

With the above context in mind the Youth Council is reframing its focus and proposing the following:

OUR VISION: ALL YOUTH---ONE SYSTEM:

Our vision is that San Francisco offers a comprehensive and coordinated system of care, which provides a continuum of quality services to ensure that all youth are equipped with the skills, knowledge and abilities to prepare them for successful employment, academic and life choices by age 25.

Subcontractors 12/3/03	*WIA focus has been a combination of vocational and academic –* ☐ *Is there an expansion of the focus in terms of a broader range of youth service?* ☐ *Is the Youth Council looking at taking an expanded role?* ☐ *It is important that education & vocational services remain a focus of the Youth Council, and it should be mentioned more often in the strategic planning document* ☐ *Will we be creating a future blue-collar workforce because they are being placed in entry-level jobs but are not able to get access to college? There is a need to stress education/college preparation in this document.*

The conditions one would find in a comprehensive youth serving system include, but are not limited to:

1. Youth are aware of options/services available to them;
2. Environments for learning and services are safe;
3. Networks of support for youth are available and apparent;
4. Caring adults are involved in supporting youth to attain goals;
5. Access is present for achieving educational and employment support;
6. A continuum of care exists that supports all areas of youth development;

Subcontractors 12/3/03	A continuum of care exists that supports all areas of youth development ***across services and providers***;
Allies Dialogue 12/16/03	*The importance of recognizing the need for culturally complimentary programs and services*

7. The investments made are strategic and connected to other resources;
8. Services and support are ongoing and outcome based, not time/age based;
9. Intake, referral and assessments are common and shared between agencies;
10. Neighborhoods are receiving services that address local concerns;
11. Individual service plans exist for youth and are used across agencies.

MISSION/PURPOSE:

To ensure quality, safe and healthy learning environments and opportunities, built on youth development principles, which lead to a high school diploma or certificate, and successful transitions to work or further education.

PRIMARY STRATEGIES:

I. Focus on occupational preparation that leads to youth employment and successful transitions.
II. Emphasize HS graduation or certification as minimum performance expectations.

Subcontractors 12/3/03	*Emphasize HS graduation or certification* and education beyond (or, "encouraging students to go beyond HS*) as minimum performance expectations.* *Be aware that not all youth will be able to graduate from high school. Need to provide other options and support services if they cannot. Re-examine the phrase, "minimum performance expectation" (If they don't succeed at graduating, have they failed?)* *What does 'certification' mean?*
Allies Dialogue 12/16/03	*Need to include low-income youth without resources for college prep (i.e., youth who are the first generation to attend college) and give them options other than low-income and/or low-skill jobs* *Need to keep in mind that most of the youth in the juvenile justice system have 'special needs'.* *High school education may be a difficult goal for some programs to achieve.* *As long as the school system is not effectively serving this population (youth with multiple barriers to success), it will require even more resources to provide solutions for them.* *There is not currently the capacity in the alternative schools to take in all those youth who are not doing well in the regular schools.*

III. Target investments to at-risk, out-of-school youth, those in-school who are not on track to graduate, youth in the juvenile justice and foster care system, and pregnant and parenting teens.

Subcontractors 12/3/03	*Add 'emancipated foster youth' and 'immigrant youth'* *Need to develop clear definition of 'at-risk' youth* *Add "youth with multiple barriers to employment" (ESL, no job skills – immigrant youth)* *The lack of a high school education may be due to the lack of funds – the youth has to work to help support their family.*
Allies Dialogue 12/16/03	*Should not try to define every possible 'at-risk' factor for youth. Let the service providers make a case for youth they have thus identified.* *Service focus may not be on avoiding 'negative outcomes' (dropping out of school, drugs, teen pregnancy) but on achieving positive ones (getting good grades, going to college, finding a job that can lead to a career).*

IV. Engage youth in leadership roles and evaluation functions to assure service designs support a comprehensive youth development system.

V. Create a high level of agreement between organizations (DHS, SFUSD, DR, DCYF, and Juvenile Probation) to allow for seamless program delivery.

Subcontractors 12/3/03	*[add: City College; University of California, San Francisco; SF State University]* *There are issues particular to the Individual Learning Program in the SFUSD. There is a need to focus on these youths' special needs, i.e., an ILP youth with straight A's is not at the same level as, say, a student from Lowell High School with straight A's.*
Allies Dialogue 12/16/03	*Employers and education plans will have to work more closely together*

VI. Support and finance neighborhood-based youth centers.

SUPPORTIVE STRATEGIES:

I. Engage the private sector in creating more youth employment opportunities connected to youth's career aspirations.

Allies Dialogue 12/16/03	*There is the need for a higher profile for this plan. Federal involvement in youth programs is on the decline. There is a real need for some entity to form a partnership with key employers in the private sector to create employment opportunities, be self-sustaining and create additional partnerships over time.* *There is a need for employers in San Francisco to discuss what they are willing to do to address what they say they don't have.*

II. Create common intake, referral, assessment tools and strategies, including an individual youth plan for shared accountability of those served; "hand-off, not drop-off".

Allies Dialogue 12/16/03	*Where is a good place to get a list of 'youth resources' in San Francisco so a service provider can research where to 'hand-off' a youth to ensure continuity of services until age 25?*

III. Invest in contractors who are leveraging multiple funding streams and providing comprehensive services either themselves or with partners.

Subcontractors 12/3/03	*The challenge of documenting 'collaboration' – how does one measure quality and degree of partnership?*

IV. Mobilize, expand and align adult mentors to support youth beyond funded activities or timelines.

V. Align RFP's and agency policies from primary youth investors to create a comprehensive service strategy until age 25.

Subcontractors 12/3/03	[NOTE: THERE WAS SOME INITIAL SURPRISE AT THE RAISING OF THE AGE LIMIT TO 25, BUT NO VOICED OBJECTION. IN FACT, LATER IN THE MEETING THE RECOMMENDATION WAS MADE TO CONSIDER LOWERING THE AGE AT WHICH YOUTH COULD START, SO AS TO ENGAGE THEM EVEN SOONER.]

VI. Balance investments to assure capacity building of staff and system-building efforts.
VII. Develop agreements with SFUSD to support in-school and out-of-school alternative systems for student achievement.

Allies Dialogue 12/16/03	*How do we get more resources into the system?*

VETTING QUESTIONS:

1) Given limited resources, what target populations should be a priority?

Subcontractors 12/3/03	*Need a definition for 'in school' and 'out of school'?*
Mtg. At RAP HS 12/10/03	*Youth not on track to graduate* *Out-of-school youth* *Immigrant / undocumented youth* *Homeless youth*
Mtg. At Oakdale 12/11/03	*Include: youth with special needs, homeless youth, children living in families with drug-addictions, DHS clients under protective services, in-school youth on track for achievement* *CPS, Juvenile Justice, youth suspended from school, youth in gangs* *Caution about glorifying gang activity by focusing on gang-involved youth exclusively* *Need to find way to touch all our youth* *Lift up the achieving youth to encourage others to follow* *Identify those 'on the fence' and move them to the 'correct' side*

2) Will these strategies measurably improve the likelihood of youth successfully transitioning self-sufficiency and further education? If not, what would you suggest?

Mtg. At Oakdale 12/11/03	*Multi-year funding* *Development of qualified workforce* *Partnering with local business associations for policies regarding youth employment* *Develop community/city-wide employment bank to connect youth service providers with employers* *Have youth members on the adult Youth Council* *Partner with UCSF and other to create internships in neighborhood businesses* *More outreach to business* *Enforcement of first-source hiring requirement - add a percentage of youth to the first-source hire ordinance* *Provide qualified workforce through CBO's* *Work with Redevelopment Agency*
Allies Dialogue 12/16/03	*What other than 'aligning resources' will be done to ensure youth in need of services are served?* *'Peer mentoring' has been proven to provide the best support for the most at-risk youth – mixing the most at-risk with those who are achieving some results.*

3) What additional strategies do you believe are necessary to build a system of quality education and employment services for youth in SF?

Mtg. at RAP HS 12/10/03	*Engage the private sector (employers)* *Develop and invest in IDA or ITA (IDA- Individual Development Accounts, ITA – Individual Training Accounts)* *Grant service providers multi-year funding* *Invest in service providers so they can sustain themselves for the long-term ("long-term" not defined) [recommended by a youth]* *Be more aware of factors/barriers youth face regarding employment* *Educate youth on: college/school financing, investing, home ownership* *Educate and provide incentives that lead youth to entrepreneurial opportunities – especially small business development* *Provide funding for community events that occur on weekends after school and that may take up the whole day [youth input]* *Invest in service providers for the long-term* *Invest in service providers that engage youth for a longer period of time, not just 3 or 4 months [youth input]* *Provide funding that will allow kids access to neighborhood gymnasiums* *Provide funding for the development of safe havens for youth in the Mission [youth input]* *Develop partnerships with local college (CCSF, SFSU, UC). Also provide funding for college tours and how youth can access financial aid for college* *Institute strategies for leadership alignment (youth who are leaders of other youth)* *Institute strategies for parental involvement [parental input]* *Connecting youth to relevant community advocates*

4) What key policies would you recommend being changed to further advance quality services for youth in SF?

Subcontractors 12/3/03	*There is a need to dialogue – in a separate forum – about criteria for training programs to ensure placement. The reality is that DOL is all about training and placement – and the need to recognize expectation on the part of the funding source.* ☐ *This brings up the need to forge stronger alliances with the private sector to ensure cooperation for the placement process.* ☐ *The need for ongoing job development geared toward youth* ☐ *There is a continued need for subcontractors to develop and seek employment opportunities for youth (cannot rely solely on private sector)* *There is a need to stop 'recycling' the youth through the youth services system. The need to create an agency that just focuses on job development that everyone can go to. Should this be a focus of PIC/DCYF to develop?* *The need to address 'youth bias' on the part of employers – this works against our youth when jobs are being filled.* *There are gaps in funding currently: 1) for youth who is simply 'truant' (they may not be covered for services; and 2) there is a lack of funding for*

	coordination of services – it is primarily direct services that are funded. ☐ *There is the need to stress that employment and education services work together more closely* ☐ *Youth employment programs working more close with the private sector* ☐ *The need to create a mechanism to capture males over the age of 18 who don't want to register for selective services (i.e., those who fall outside of current WIA funding guidelines)*
Mtg. At RAP HS 12/10/03	*Youth membership on youth council (2-4 members)* *Establish a 'junior' youth council with veto power* *All agencies need a youth on its board of directors as a requirement to receive funding* *Establish a committee that would evaluate the Youth Council in its performance* *Qualitative evaluation process for subs* *DCYF change age limit from 171/2 to 25 years of old* *PIC change its age limit from 21 to 25* *Ongoing assessment*
Mtg. At Oakdale 12/11/03	*Develop policy that will hold first source hiring accountable – enforce a policy that says a percentage of youth will be hired.* *Develop initiative that engages and hold accountable truancy officers* *Advocate for high school in the Bayview – will lessen the need for busing of youth* *Seamless system of intake/referrals/evaluations* *Implement parent survey (1-page format)* *Enforcement of first-source hire* *DCYF age range expanded* *WIA expansion to age 25* *SFUSD needs to partner with community – incorporated into a plan to serve our youth* *SFUSD more easily drop non-attending youth from rolls so they can be enrolled into alternative schools* *BVHP school – better first period attendance* - *better parent involvement* *Truancy enforcement* *In-school counselors to identify youth in crisis*

5) What primary performance measures best describe a quality program?

Subcontractors 12/3/03	*Add 'youth development' as a performance measure. Use before and after self-assessment by youth served as a way to illustrate the success/difference made in their life by having participated in the program.* *Suggest skills attainment be recognized as a performance measurement utilizing pre- and post- testing.* *Use 'program completion' as a measure*

Mtg. at RAP HS 12/10/03	*Having caring adults* *Low ratios (lighter caseloads for case managers)* *Youth completion rate* *Stability of program – sustainability (could survive without PIC funding)* *Linkages to other programs* *Documentation – capturing needed information for further funding* *Agencies that provide follow-up* *Mandate agencies to do follow-up for two years* *Are youth part of the program design* *Parental involvement* *Staff that show respect to the youth [youth input]* *Hiring staff that 'look like' the population it serves [youth input]* *Hiring staff that can 'relate' to young people[(youth input]*
Mtg. At Oakdale 12/11/03	*Documentation* *Parental involvement – especially for in-school youth* *Who does good follow-up* *Participation* *Outcomes / Benchmarks* *Grade improvement* *Job tenure – retention* *Participant evaluation/Parent evaluation* *Timely evaluations* *Accountability*

6) How should the voice of youth best be incorporated program design and implementation?

Subcontractors 12/3/03	☐ *The importance of creating youth leadership council at each youth services site or in their communities* ☐ *Putting youth on the WISF Youth Council* ☐ *The possibility of 'marrying' this group with the Mayor's Youth Council to utilize an existing entity?* *Concern that the youth services system will mimic the adult One-Stop: that there will more money going into building the system than into the training.*
Mtg. At RAP HS 12/10/03	*Establish a youth council, where members receive a stipend* *Youth be decision-makers on how contracts are to be done* *Youth approval of which agencies receive contracts* *Contract renewals be approved by youth* *Opinions heard and executed when making decisions*
Mtg. At Oakdale 12/11/03	*A Youth Council* *Youth actually are involved in the design of the programs for them* *Focus on programs of 'best practices' and that have established connections.* *Involve youth in fundraising*
Allies Dialogue 12/16/03	*Hire as entry-level adult staff graduates of the program*

	The need for on-going dialogue with youth in vetting/public forums *Solicit evaluations from youth served (anecdotal) to submit to funders of the programs* *Do evaluations post-service delivery and incorporate the feedback into the program design* *Start with strong training for youth – then allow them to take leadership roles in the program; make leadership part of the basic expectations of the youth*

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR COORDINATING RELEASE OF YOUTH SERVICES REQUEST FOR PROPOSALS WITH DCYF (AGENDA ITEM 5D)

BACKGROUND

The Workforce Investment Act challenges local communities, through the Youth Council, to establish a collaboration that brings together schools, community organizations, training providers and others to create a comprehensive and cohesive youth assistance strategy.

Beginning October 2002 the Youth Council began that process with a meeting facilitated by JD Hoye that reviewed the elements of a common local youth services system, the function of a Youth Council in building the system, and the various stages of building that system. This launch of a planning process was followed by presentation from the Youth Employment Research Mapping Project, the Department of Children, Youth and their Families (DCYF) a community needs assessment report, the San Francisco Department of Juvenile Probation, Coleman Advocates, the San Francisco Unified School District, and an open forum for youth. Subsequently, the Youth Council created a working group to build a framework for an all-day full Council planning retreat.

At the retreat of 10/03/2003, during a review of the strategic planning timeline the system goal of improving alignment of youth services funding processes was discussed. Council members suggested that a formal action item be brought before the Youth Council to adopt the principle of coordinating the release of WIA youth funds with DCYF through a joint or coordinated Request for Proposal (RFP).

DISCUSSION

Current federal rules require that WIA-funded youth services be competitively procured at least once every three years. In the current year the Youth Council funded 14 youth services subcontractors for a total of $1.9 million. DCYF, while not limited to the Federal rules, releases funds every two years with a considerable amount dedicated to youth employment. The WIA youth RFP three-year procurement cycle began 7/2001, and therefore eligible subcontractors could be extended an additional year beyond July 1, 2004, and a joint RFP for contracts beginning in July 1, 2004 would provide the next opportunity for funding alignment with DCYF.

Also, because both the PIC and DCYF fund many of the same organization for similar services, a joint (RFP) potentially allows for

- a joint review of proposals to insure the greatest level of consensus with the Youth Council's strategic plan,
- the opportunity to better address system gaps in services and reduction of duplication of services.

Additionally, because WIA eligibility is limited primarily to low-income families, and serves youth ages 14 through 21, funding alignment will potentially allow organizations to receive funding in such a way that a broader section of the youth population is served.

Finally, coordination could allow for more strategic investment of funds, creating a more cohesive system of care that targets resources to Youth Council priorities and creates a better environment for inter-organization coordination based on common standards, performance measures, intake and assessment tools, resulting in improved outcomes.

RECOMMENDATION

The Executive Committee recommends that the Workforce Investment San Francisco Board adopt a principle of a simultaneous and coordinated release of a youth services requests for proposal and review of funding proposals and to direct staff to begin discussions with DCYF to determine the best mechanism and timing to achieve the highest level of coordination of a system most consistent with the Youth Council's strategic plan.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: MAYOR'S OFFICE OF COMMUNITY DEVELOPMENT (MOCD) GRANT PROPOSAL (AGENDA ITEM 5E)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to ratify Executive Committee's recommendation regarding the submission of a MOCD grant proposal to fund the Enterprise Zone Vouchering Project for PY July 1, 2004 – June 30, 2005. MOCD has been funding the project in the amount of $70,000 – $75,000 since 1998. The project has exceeded its program goal every year since 1998. The annual program goal for PY 2004 is the issuance of 475 voucher certifications to low-income individuals. Staff expects to issue more than 2500 certifications to low-income and above low-income individuals during this program year.

PROJECT'S DESCRIPTION AND MAJOR ACTIVITIES:

The Enterprise Zone Vouchering Project helps to promote hiring tax credits by marketing and providing technical assistance to employers to access the Enterprise Zone and other tax credits, which is accomplished through the following:

a. Market Enterprise Zone incentives, and other local and federal tax incentives to San Francisco Business Community
b. Provide technical assistance, such as eligibility determination and tax credit paperwork, etc. to businesses as needed
c. Process Enterprise Zone tax credit certifications
d. Provide training to staffs of employment & training, or economic development agencies on the ins and outs of the tax incentives
e. Plan, coordinate, and execute annual Employer's Forum

Since PY 2000, the number of voucher certifications has increased on an average of 36% each year. To compensate for the program cost incurred by the significant increase of voucher certifications, staffs recommend the request of $100,000 to fund this project.

Staff will be available at the February 18th meeting to answer any questions you may have. Should you have any questions, prior to the meeting, please contact Robert Schwab at 431-8700.

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WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO APPROVE CUSTOMIZED TRAINING FUNDING TO THE SAN FRANCISCO HOTEL/RESTAURANT LABOR/MANGEMENT EDUCATION FUNDS PROJECT (AGENDA ITEM 5F)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to ratify the Executive Committee's approval for the funding in the amount of **$10,000** for the San Francisco Hotel/ Restaurant Labor/ Management Education Consortium to operate a customized training program. The total cost of the training is proposed at $20,000. The San Francisco Hotel/ Restaurant Labor/ Management Education Consortium will match WIA Customized Training Funds in the amount of no less than $10,000 to train 20-25 individuals.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On December 16, 2003, the San Francisco Hotel/ Restaurant Labor/ Management Education Consortium representing a group of eleven hotels, and the City College of San Francisco (the training provider) jointly submitted a proposal for funding of a Customized Training project.

Based on staff's review of the proposal, the Program intends to train 20-25 individuals, who earn between $10.29 to $16.27 per hour. The Program is designed to prepare existing persons occupying entry-level housekeeping/ stewarding jobs to advance into higher skilled and paid positions such as Restaurant Busser, Banquet Busser, Barback and Banquet Houseperson. The result of the training also provides a better career-ladder opportunity for participants.

The cost of the training is considered to be cost effective compared with other Private Industry Council of San Francisco, Inc.'s WIA funded programs. In fact, the average WIA cost per participant for this project is only $425.00. The duration of the course is eight weeks and the three-hour class meets two times per week for a total of 48 hours of training. Trainees successfully completing the training are expected to either advance to a different job classification with wage increase, or transition to a higher job classification on a part-time basis and receive increase in more work hours when they perform tasks under the new classification. The employers expressed good faith efforts in retaining and advancing individuals upon successful completion of the training. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

Executive Committee recommends that the Workforce Investment San Francisco Board approve the requested $10,000 funding for this Customized Training project.

If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO ADOPT THE 2003 SAN FRANCISCO SELF-SUFFICIENCY STANDARD (SSS) (AGENDA ITEM 5G)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to ratify the 2003 definition of Self-Sufficiency Standard (SSS) for San Francisco calculated by Dr. Diana Pearce at the University of Washington, in conjunction with Wider Opportunities for Women (WOW) and the National Economic Development Law Center (NEDLC). The Workforce Investment San Francisco Board is also asked to give staff the authority to automatically update the SSS whenever it is adjusted by WOW and NEDLC.

BACKGROUND

On March 12, 2003, this Committee adopted the Program Resources Committee's recommendation on the SSS adjusted for 2002 for San Francisco developed and calculated by Wider Opportunities for Women as the eligibility criteria for WIA Adult funds for intensive and training services.

On July 9, 2003, this Committee adopted the Employer Services Committee's recommendation on using 2002 SSS to determine eligibility for the currently employed individuals who wish to participate in the Customized Training program. Employed individuals are eligible for the program if their income falls below the 75% of the San Francisco Self-Sufficiency Standard. Instead of using the wide spectrum of family sizes of the SSS, the Employer Services Committee recommended that the SSS for all currently employed customized training participants be based on a typical family size of "one adult and one school age child" for eligibility determination. This Committee adopted the recommendation; which was translated to $13.78 per hour assuming a 40-hour work week, or a monthly equivalent of $2388.93.

WOW and NEDLC recently released the SSS for California for 2003. The new SSS for San Francisco is attached to this memorandum for your reference.

RECOMMENDATIONS

Since the SSS is adjusted on a periodic basis to better depict the economic situations of working families in San Francisco and other areas; therefore Executive Committee recommends the following:

(1) The WISF Board adopts the 2003 SSS for San Francisco as the eligibility criteria for all WIA funded programs that use the SSS for eligibility determination. For purposes of the Customized Training program, Executive Committee recommends the continuation of using 75% of the “one adult and one school age child” family size of the SSS to determine currently employed trainees’ eligibility. The adjusted 75% of the hourly wage for this family size is **$15.08** assuming a 40-hour work week, or a monthly equivalent of **$2652.75**.

(2) For future WISF Board SSS adjustments, the local SSS will be indexed to the annual recalculation and issuance of the SSS by the WOW and NEDLC program.

Staff will be at your February 18, 2004 meeting to discuss these recommendations. If you have any questions prior to the February 18th meeting, please contact Robert Schwab at 431-8700.

Attachment

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

	One Adult	One Adult, One Child				One Adult, Two Children		
Monthly Costs	*Adult*	*Adult + infant*	*Adult + preschooler*	*Adult + schoolage*	*Adult + teenager*	*Adult + infant + infant*	*Adult + infant + preschooler*	*Adult + infant + schoolage*
Housing	1405	1775	1775	1775	1775	1775	1775	1775
Child Care	0	975	900	440	0	1949	1875	1415
Food	182	266	276	322	341	348	358	402
Transportation	45	45	45	45	45	45	45	45
Health Care	67	182	194	193	213	189	201	200
Miscellaneous	170	324	319	277	237	431	425	384
Taxes	466	840	812	621	511	1420	1358	1021
Earned Income Tax Credit (-)	0	0	0	0	0	0	0	0
Child Care Tax Credit (-)	0	(50)	(50)	(53)	0	(100)	(100)	(100)
Child Tax Credit (-)	0	(83)	(83)	(83)	(83)	(167)	(167)	(167)
Self-Sufficiency Wage								
-Hourly	$13.26	$24.28	$23.79	$20.10	$17.27	$33.47	$32.78	$28.26
-Monthly	$2,334	$4,273	$4,187	$3,537	$3,039	$5,891	$5,770	$4,974
-Annual	$28,012	$51,275	$50,239	$42,444	$36,467	$70,691	$69,241	$59,691

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Monthly Costs	Adult + infant + teenager	Adult + preschooler + preschooler	Adult + preschooler + schoolage	Adult + preschooler + teenager	Adult + schoolage + schoolage	Adult + schoolage + teenager	Adult + teenager + teenager
Housing	1775	1775	1775	1775	1775	1775	1775
Child Care	975	1800	1340	900	880	440	0
Food	420	367	411	429	455	473	492
Transportation	45	45	45	45	45	45	45
Health Care	220	213	212	232	212	232	251
Miscellaneous	343	420	378	338	337	296	256
Taxes	812	1315	977	786	719	594	490
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(50)	(100)	(100)	(50)	(100)	(50)	0
Child Tax Credit (-)	(167)	(167)	(167)	(167)	(167)	(167)	(167)
Self-Sufficiency Wage							
-Hourly	**$24.85**	**$32.21**	**$27.68**	**$24.37**	**$23.61**	**$20.67**	**$17.86**
-Monthly	**$4,374**	**$5,668**	**$4,872**	**$4,289**	**$4,155**	**$3,638**	**$3,143**
-Annual	**$52,488**	**$68,018**	**$58,461**	**$51,465**	**$49,860**	**$43,658**	**$37,712**

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

	One Adult, Three Children						
Monthly Costs	*Adult + infant + infant + infant +*	*Adult + infant + infant + preschooler*	*Adult + infant + infant + schoolage +*	*Adult + infant + infant + teenager*	*Adult + infant + preschooler + preschooler*	*Adult + infant + preschooler + schoolage*	*Adult + infant + preschooler + teenager*
Housing	2435	2435	2435	2435	2435	2435	2435
Child Care	2924	2849	2389	1949	2775	2315	1875
Food	422	431	473	490	439	481	499
Transportation	45	45	45	45	45	45	45
Health Care	197	209	208	228	221	220	240
Miscellaneous	602	597	555	515	591	550	509
Taxes	2712	2668	2257	1931	2625	2213	1887
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(100)	(100)	(100)	(100)	(100)	(100)
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage							
-Hourly	$50.45	$49.90	$45.25	$41.15	$49.35	$44.70	$40.57
-Monthly	$8,878	$8,782	$7,964	$7,242	$8,686	$7,868	$7,140
-Annual	$106,541	$105,385	$95,568	$86,908	$104,228	$94,411	$85,676

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

One Adult, Three Children, continued

Monthly Costs	Adult + infant + schoolage + schoolage	Adult + infant + schoolage + teenager	Adult + infant + teenager + teenager	Adult + preschooler + preschooler + preschooler	Adult + preschooler + preschooler + schoolage	Adult + preschooler + preschooler + teenager	Adult + preschooler + schoolage + schoolage
Housing	2435	2435	2435	2435	2435	2435	2435
Child Care	1855	1415	975	2700	2240	1800	1780
Food	523	541	558	448	490	508	532
Transportation	45	45	45	45	45	45	45
Health Care	219	239	259	233	232	252	231
Miscellaneous	508	467	427	586	544	504	502
Taxes	1874	1548	1285	2581	2170	1844	1831
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(100)	(50)	(100)	(100)	(100)	(100)
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage							
-Hourly	**$40.39**	**$36.02**	**$32.29**	**$48.80**	**$44.15**	**$39.98**	**$39.81**
-Monthly	**$7,109**	**$6,340**	**$5,684**	**$8,589**	**$7,771**	**$7,037**	**$7,006**
-Annual	**$85,303**	**$76,078**	**$68,206**	**$103,072**	**$93,255**	**$84,443**	**$84,071**

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

One Adult, Three Children, continued

Monthly Costs	Adult + preschooler + schoolage + teenager	Adult + preschooler + teenager + teenager	Adult + schoolage + schoolage + schoolage	Adult + schoolage + schoolage + teenager	Adult + schoolage + teenager + teenager	Adult + teenager + teenager + teenager
Housing	2435	2435	2435	2435	2435	2435
Child Care	1340	900	1320	880	440	0
Food	549	567	574	591	609	627
Transportation	45	45	45	45	45	45
Health Care	251	271	231	250	270	290
Miscellaneous	462	422	460	420	380	340
Taxes	1505	1242	1492	1147	902	762
Earned Income Tax Credit (-)	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(50)	(100)	(100)	(50)	0
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage						
-Hourly	$35.44	$31.71	$35.26	$30.79	$27.16	$24.14
-Monthly	$6,237	$5,581	$6,206	$5,418	$4,781	$4,248
-Annual	$74,845	$66,974	$74,473	$65,020	$57,372	$50,973

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Monthly Costs	2 Adults	Two Adults, One Child				Two Adults, Two Children		
	2 Adults	2 Adults + infant	2 Adults + preschooler	2 Adults + schoolage	2 Adults + teenager	2 Adults + infant + infant	2 Adults + infant + preschooler	2 Adults + infant + schoolage
Housing	1405	1775	1775	1775	1775	1775	1775	1775
Child Care	0	975	900	440	0	1949	1875	1415
Food	358	437	446	490	508	506	515	557
Transportation	90	90	90	90	90	90	90	90
Health Care	212	219	231	231	251	227	239	238
Miscellaneous	207	350	344	303	262	455	449	407
Taxes	373	802	778	599	488	1130	1087	891
Earned Income Tax Credit (-)	0	0	0	0	0	0	0	0
Child Care Tax Credit (-)	0	(50)	(50)	(50)	0	(100)	(100)	(100)
Child Tax Credit (-)	0	(83)	(83)	(83)	(83)	(167)	(167)	(167)
Self-Sufficiency Wage								
-Hourly	**$7.52** *per adult*	**$12.82** *per adult*	**$12.59** *per adult*	**$10.78** *per adult*	**$9.35** *per adult*	**$16.66** *per adult*	**$16.37** *per adult*	**$14.51** *per adult*
-Monthly	**$2,645**	**$4,514**	**$4,431**	**$3,794**	**$3,291**	**$5,865**	**$5,763**	**$5,106**
-Annual	**$31,744**	**$54,171**	**$53,176**	**$45,523**	**$39,489**	**$70,380**	**$69,158**	**$61,278**

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Two Adults, Two Children, continued

Monthly Costs	2 Adults + infant + teenager	2 Adults + preschooler + preschooler	2 Adults + preschooler + schoolage	2 Adults + preschooler + teenager	2 Adults + schoolage + schoolage	2 Adults + schoolage + teenager	2 Adults + teenager + teenager
Housing	1775	1775	1775	1775	1775	1775	1775
Child Care	975	1800	1340	900	880	440	0
Food	574	524	565	583	607	625	643
Transportation	90	90	90	90	90	90	90
Health Care	258	251	250	270	250	269	289
Miscellaneous	367	444	402	362	360	320	280
Taxes	766	1060	867	741	677	559	457
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(50)	(100)	(100)	(50)	(100)	(50)	0
Child Tax Credit (-)	(167)	(167)	(167)	(167)	(167)	(167)	(167)
Self-Sufficiency Wage							
-Hourly	$13.03 per adult	$16.13 per adult	$14.27 per adult	$12.80 per adult	$12.42 per adult	$10.97 per adult	$9.56 per adult
-Monthly	$4,588	$5,677	$5,023	$4,505	$4,372	$3,862	$3,366
-Annual	$55,058	$68,126	$60,274	$54,055	$52,466	$46,340	$40,395

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Two Adults, Three Children

Monthly Costs	2 Adults + infant + infant + infant	2 Adults + infant + infant + preschooler	2 Adults + infant + infant + schoolage	2 Adults + infant + infant + teenager	2 Adults + infant + preschooler + preschooler	2 Adults + infant + preschooler + schoolager	2 Adults + infant + preschooler + teenager
Housing	2435	2435	2435	2435	2435	2435	2435
Child Care	2924	2849	2389	1949	2775	2315	1875
Food	566	575	614	631	583	623	639
Transportation	90	90	90	90	90	90	90
Health Care	234	246	246	265	258	258	277
Miscellaneous	625	620	577	537	614	572	532
Taxes	2271	2227	1814	1484	2183	1770	1422
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(100)	(100)	(100)	(100)	(100)	(100)
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage							
-Hourly	$24.72 per adult	$24.44 per adult	$22.10 per adult	$20.01 per adult	$24.16 per adult	$21.83 per adult	$19.66 per adult
-Monthly	$8,700	$8,603	$7,781	$7,042	$8,505	$7,684	$6,920
-Annual	$104,397	$103,231	$93,369	$84,501	$102,065	$92,203	$83,035

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Two Adults, Three Children, continued

Monthly Costs	2 Adults + infant + schoolage + schoolage	2 Adults + infant + schoolage + teenager	2 Adults + infant + teenager + teenager	2 Adults + preschooler + preschooler + preschooler	2 Adults + preschooler + preschooler + schoolage	2 Adults + preschooler + preschooler + teenager	2 Adults + preschooler + schoolage + schoolage
Housing	2435	2435	2435	2435	2435	2435	2435
Child Care	1855	1415	975	2700	2240	1800	1780
Food	662	679	696	591	631	648	671
Transportation	90	90	90	90	90	90	90
Health Care	257	277	297	270	270	289	269
Miscellaneous	530	490	449	609	567	526	524
Taxes	1413	1212	1055	2140	1726	1395	1386
Earned Income Tax Credit (-)	0	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(100)	(50)	(100)	(100)	(100)	(100)
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage							
-Hourly	$19.58 per adult	$17.75 per adult	$16.18 per adult	$23.89 per adult	$21.55 per adult	$19.41 per adult	$19.33 per adult
-Monthly	$6,892	$6,247	$5,696	$8,408	$7,586	$6,833	$6,805
-Annual	$82,701	$74,962	$68,356	$100,899	$91,037	$81,995	$81,660

The Self-Sufficiency Standard for San Francisco County, CA, 2003
San Francisco, CA PMSA

Click on a Family Type

Two Adults, Three Children, continued

Monthly Costs	2 Adults + preschooler + schoolage + teenager	2 Adults + preschooler + teenager + teenager	2 Adults + schoolage + schoolage + schoolage	2 Adults + schoolage + schoolage + teenager	2 Adults + schoolage + teenager + teenager	2 Adults + teenager + teenager + teenager
Housing	2435	2435	2435	2435	2435	2435
Child Care	1340	900	1320	880	440	0
Food	687	704	710	727	744	761
Transportation	90	90	90	90	90	90
Health Care	289	309	268	288	308	328
Miscellaneous	484	444	482	442	402	361
Taxes	1185	1026	1176	961	835	710
Earned Income Tax Credit (-)	0	0	0	0	0	0
Child Care Tax Credit (-)	(100)	(50)	(100)	(100)	(50)	0
Child Tax Credit (-)	(250)	(250)	(250)	(250)	(250)	(250)
Self-Sufficiency Wage						
-Hourly	**$17.50** *per adult*	**$15.93** *per adult*	**$17.42** *per adult*	**$15.55** *per adult*	**$14.07** *per adult*	**$12.60** *per adult*
-Monthly	**$6,160**	**$5,608**	**$6,132**	**$5,474**	**$4,954**	**$4,434**
-Annual	**$73,921**	**$67,295**	**$73,587**	**$65,684**	**$59,448**	**$53,212**

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 9, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR DISLOCATED WORKER PROGRAM PRIORITIES (AGENDA ITEM 5H)

Action Requested

The WISF Board is asked to adopt the current service priorities for the WIA Dislocated Worker program.

Background

A work group comprised of Committee and community members and PIC has been meeting periodically since November of 2002 to discuss ways to improve services to dislocated workers in San Francisco. At its November 2003 meeting the PRC formally placed the work group under the PRC's authority; the work group has scheduled regular monthly meetings. The work group met last on November 19. Information on the meeting was sent to all PRC and Committee of Community Agencies (CCA) members, PIC and DHS staff. It was also posted on PIC's web site. These recommendations originally came from the work group.

Current Priorities

The WIA Dislocated Worker Program (DWP) currently operates under a set of service priorities that have not been formally adopted by the Workforce Investment San Francisco (WISF) Board. These priorities are, in descending order:

- Individuals who are displaced from a permanent closure or a substantial layoff in San Francisco
- Individuals who were working or reside in San Francisco and were laid off from long-term, permanent employment, are facing significant barriers to reemployment, and are unlikely to return to their previous occupation
- Individuals referred for training by EDD's profiling program
- Other individuals meeting eligibility criteria (i.e. self employed or displaced homemaker, federal definition in Workforce Investment Act, Section 101)

Recommendation

The Executive Committee feels that the DWP operates well under the current service priorities, and accordingly recommends that WISF formally adopt those priorities.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 9, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR AUDIT SERVICES OF THE PRIVATE INDUSTRY COUNCIL OF SANFRANCISCO, INC. (AGENDA 5I)

ACTION REQUESTED

The WISF Board is asked to ratify the selection of Izabal, Bernaciak & Company, to conduct auditing services for the PIC, Inc.

BACKGROUND

Three proposals were received by the November 14, 2003 deadline in response to the Request For Quotes (RFQ) issued October 29, 2003. Each proposal was read and scored by all three members of the Review Task Force. The reviewers were Nicholas L. de Lorenzo, Project Director at the National Council of the Aging (NCOA) and a member of the Workforce Investment San Francisco (WISF) Board., David Curto, Senior Contract Manager at the San Francisco Department of Human Services (DHS) and Joel Streicker, staff of the Private Industry Council of San Francisco, Inc. (PIC).

The three proposals were from Izabal, Bernaciak & Company (San Francisco), Harrington Group (San Rafael) and Lautze & Lautze (San Francisco).

On November 25, 2003 each reviewer scored the proposal based on points assigned to five categories that the Finance Subcommittee approved on November 6, 2003. The reviewers wrote a brief summary of their scoring of each proposal.

The range of the proposal prices was from $22,500 to $32,000 and was supported by adequate *Quality Review Reports* as established by the Peer Review Board of the AICPA (American Institute of Certified Public Accountants).

Izabal, Bernaciak & Company received a score from the Review Task Force of 95, while the other two proponents received scores of 78 out of a possible 100 points. While the bid of $28,500 from Izabal, Bernaciak & Company was not the lowest, factors such experience in Workforce Investment type funding, past history and a reasonable estimate of cost and proposed hours was the key for the selection of this proposal.

RECOMMENDATION

The Executive Committee recommends Izabal, Bernaciak & Company to be awarded the contract of auditing service for the PIC. Upon mutual agreement of both parties, this audit contract may be extended for thee years.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: DECEMBER 9, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR FINAL AND CARRY FORWARD REFUGEE FORMULA FUNDS WITH REVIEW OF SUBCONTRACTORS' FEDERAL FISCAL YEAR (FFY) 2002 PERFORMANCE (AGENDA ITEM 6A)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to approve a final expenditure plan for FFY 2003 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) formula funds and a small amount of FFY 2002 carry forward funds.

AVAILABLE FUNDS

Staff have identified a small amount of funds for services that are unexpended from FFY 2002 and will be carried forward to FFY 2002 programs. In addition, there are differences between San Francisco's FFY 2003 preliminary and final allocation amounts. The preliminary amounts were used for initial funding recommendations in August. The differences are as follows:

Final FFY 03 TA amount difference	($1,920)
Final FFY 03 RESS amount difference	$22,082
Carry Forward FFY 02 RESS funds	$1,507
Carry forward FFY 02 TA funds	$1,029
Total	$22,698

PROGRAM PERFORMANCE

Overview

The employment programs' goal was to enroll 169 new participants this year and they actually enrolled 161 (95%). (They also continued to serve 146 participants from last year.) By the end of September, the programs had a 25% employment rate with an average hourly wage of $9.34 for the new clients enrolled. (This compares to a 31% employment rate and average wage of $11.65 at this time last year and 45% employment rate and average wage of $10.97 two years ago.) As in the past, many participants who have not yet been placed in unsubsidized employment continue to be served, and therefore the employment rate should continue to increase. (The placement rate for last year's participants rose to 50% and the year before to 64%.) Seventy-eight percent of the full-time jobs included health benefits. (Eighty-five percent last year.) To say the dismal Bay Area economy has affected our performance would be an understatement. We cannot put refugees in jobs if there are no jobs.

Employment Services (ES)
The ES programs achieved 96% of their enrollment goal, and had a 25% placement rate. The ES average hourly wage was $8.97.

Vocational Training (VT)
JVS' Office Technology program achieved 69% of its enrollment goal, and has a 33% placement rate. This program's average wage was $10.62. JVS' Information Technology (IT)/Computer-Assisted Drafting and Design (CAD) program achieved 117% of its enrollment goal, and had a 14% placement rate. The average wage was $15.10. Many clients in both of these programs are still active. The overall VT placement rate was 22% and the average hourly wage was $12.41.

Acculturation/Social Adjustment Services (A/SAS)
Jewish Family & Children's Services' (JFCS) acculturation program achieved 96% of its enrollment goal, and International Institute achieved 104% of its goal.

DEMOGRAPHICS

Of the total 161 new participants who were served in employment programs, 53% were female, 55% were aged 34 to 54. Fifty-nine percent (59%) were from the Former Soviet Union (FSU); the other 41%, most of whom were asylees, were from all corners of the globe, including China, Mongolia, Myanmar (Burma), Tibet, Japan, Vietnam, Cuba, Columbia, Peru, Paraguay, Syria, Turkey, Israel, Yemen, Ethiopia, Nigeria, and Rwanda. Forty-eight percent (48%) were in the U.S. one year or less, 48% were college graduates (in their country of origin), and 63% were receiving cash assistance.

For comparison purposes, last year 56% were female, 52% were aged 34 to 54, 77% were from the Former Soviet Union (FSU), 51% were in the U.S. one year or less, 56% were college graduates (in their country of origin), and 62% were receiving cash assistance.

RECOMMENDATIONS FOR ADDITIONAL FUNDS

The attached spreadsheet contains Executive Committee recommendations for the available carry forward and unobligated funds. As with the initial funding recommendations, PIC Staff met with service providers prior to formulating these recommendations. The recommendations represent the agencies sharing the "pain" and the "gain", the pain of the decrease in TA funds and the gain of the increase in RESS funds. The recommendations are across the board decreases or increases. We will be able to serve an additional seven refugees in employment programs and seven more in acculturation services with these funds. The small amount of carry forward funds has been added to the transportation pool for fast passes for the participants. This is in line with initial recommendations in August that priority for carry forward funds be given to the supportive services pool due to the increased cost of MUNI fast passes. We also set priorities for participant transportation subsidies.

Please feel free to contact Karen Hart at 415-923-4260 should you have questions before the meeting.

Attachment

PROGRAM RESOURCES COMMITTEE FFY 2003 FINAL REFUGEE FUNDING RECOMMENDATIONS

Agency	Activity	Cost per Person	Current Svc	Current FFY 2003 Funding	TA	RESS	Recom Add/Sub Funding	TA	Final TA	RESS	Final RESS	Final Total	Recom.		Place. Rate
													Svc.	Plc.	
International Rescue Committee	CIP	$534	NA	$57,159	$50,295	$6,864	$3,229	($355)	$49,940	$3,584	$10,448	$60,388	NA	NA	NA
Catholic Charities/REAP	ES	$1,850	50	$92,500	$92,500	$0	$5,147	($653)	$91,847	$5,800	$5,800	$97,647	53	35	65%
Jewish Vocational Service	ES	$2,468	47	$113,945	$94,754	$19,191	$6,548	($596)	$94,158	$7,144	$26,335	$120,493	50	33	65%
Jewish Vocational Service	VT-IT-CAD-OTC	$4,408-68	10	$44,680	$34,255	$10,425	$2,485	($316)	$33,939	$2,801	$13,226	$47,165	11	9	80%
International Institute of San Francisco	A/SAS	$295	(50)	$14,774	$0	$14,774	$926	$0	$0	$926	$15,700	$15,700	(54)		
Jewish Family & Children's Services	A/SAS	$165	(41)	$6,706	$0	$6,706	$420	$0	$0	$420	$7,126	$7,126	(44)		
Subtotal			107	$329,764	$271,804	$57,960	$18,755	($1,920)	$269,884	$20,675	$78,635	$348,519	114	77	68%
Transportation				$22,440	$19,200	$3,240	$3,943	$1,029	$20,229	$2,914	$6,154	$26,383			
Total		$3,292		$352,204	$291,004	$61,200	$22,698	($891)	$290,113	$23,589	$84,789	$374,902			
PIC Administration				$62,153	$51,353	$10,800	$3,559	($338)	$51,015	$3,897	$14,697	$65,712			
Grand Total				$414,357	$342,357	$72,000	$26,257	($1,229)	$341,128	$27,486	$99,486	$440,614			

cost per person= $3,266

CIP	Central Intake Point	16% /16%
ES	Employment Services	59%/59%
VT	Vocational Training	13%/13%
A/SAS	Acculturation/Social Adjustment Services	6%/6%
Supportive Services		6%/6%

Agencies' Totals

IRC	$60,388	(+5.6%)
JVS	$167,658	(+5.6%)
CCCYO	$97,647	(+5.6%)
IISF	$15,700	(+6.2%)
JFCS	$7,126	(+6.2%)

12/02/03

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 9, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: FIRST SOURCE HIRING ADMINISTRATION (FSHA) TRAINING PROGRAM RECOMMENDATIONS FOR THE PERIOD JANUARY 5, 2004 – DECEMBER 31, 2004 (AGENDA ITEM 6B)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to approve the selection of subcontractors by the First Source Hiring Administration (FSHA) to provide skills training programs for entry-level construction and permanent jobs in San Francisco and in the Bay Area.

BACKGROUND

On October 14, 2003 the Private Industry Council of San Francisco (PIC) issued a Request for Qualifications (RFQ) on behalf of the FSHA to solicit proposals for programs that would recruit, train and place disadvantaged individuals who are interested in entry-level construction jobs or individuals who are seeking permanent jobs with businesses that are located in and in demand in the San Francisco Bay Area.

On November 6, 2003 the PIC received eleven (11) proposals from eight (8) different organizations in San Francisco. The total funds proposed in the eleven proposals amounted to $1,458,289. The total FSHA funds available in the RFQ were $500,000. The eight proponents were:

Asian Neighborhood Design (AND)
Brava! For Women in the Arts (BRAVA)
Chinese for Affirmative Action (CAA)
Goodwill Industries (GWI)
Mission Hiring Hall Inc. (MHH)
San Francisco Works (SFW)
The Family School (TFS)
Young Community Developers Inc. (YCD)

RECOMMENDATION

Four (4) of the proposals submitted in response to the RFQ applied for funds to operate training programs for entry-level construction jobs and seven (7) applied for training programs for entry level permanent jobs. The Executive Committee is recommending six (6) of the eleven (11) proposed programs for funding, three for construction and three for permanent jobs. In total the recommended programs will enroll 144 participants in training and place 114 into unsubsidized employment for a combined placement rate of 79% and a combined cost per placement of $4,368. The placement rate and the cost per placement are both very competitive for these kinds of training programs. These training programs will be administered by the PIC.The recommended programs are:

Construction Jobs

- **AND** to train 18 and place 14 into Cement Mason, Ironworkers and Drywall Installer jobs in collaboration with Glide Foundation for $72,000 of FSHA funds
- **CAA** to train 20 Limited-English speakers in conjunction with Community College and place 15 into Cement Mason, Ironworkers and Sprinkler Fitting jobs for $60,000 of FSHA funds
- **MHH** to train enroll 16 participants in a Construction List Trades Entrance Exam Tutorial Program with the support of Electrical Workers Union Local 6 and place 13 into Electrical Inside Wiring jobs for $50,000 of FSHA funds

Permanent Jobs

- **BRAVA** to recruit and train 25 minorities of both genders with the support of the Actor's Equity Association and place 20 into Theater Technician jobs including an 80 to 100 hour paid internship with a local theater or performing arts organization for$100,000 of FSHA funds
- **GWI** to provide hands on training to 40 participants in collaboration with the Bayview Hope Truck Driving Academy to qualify for a Class A Truck Driving License with fork lift certification and place 32 into tractor trailer truck driving and fork lift jobs for $96,000 of FSHA funds
- **SFW** to train 25 participants in partnership with the Community College's Bayview and Mission Campuses and Urban University and place 20 into newly emerging jobs in the Biotech Industry for $120,000 of FSHA funds

The proposals were reviewed by a team of three readers who read all eleven proposals independently, met three times to compare the scores they assigned according to the selection criteria determined by the RFQ, discussed their scores and then averaged them for each proposal.

Scores were determined by the proponents outreach plans, the proposed program's design and goals, job development strategies and employer or union support. The program costs proposed was a factor in scoring the programs' design and goals – this included placement rates and costs per placement.

A summary of each proposal with proposed goals and costs, the different scores assigned to each proposal by the review team and the designated goals and costs for those programs recommended for funding are attached for your information.

RECOMMENDED ACTION

The Executive Committee recommends that the Workforce Investment San Francisco Board approve the six proposed programs to be administered by the PIC for the twelve-month period of the 2004 calendar year.

Attachment

CONSTRUCTION JOBS							
	PROPOSED				RECOMMENDED		
Proponent	Enrollments	Placements	Total Cost	Score	Enrollments	Placements	Total Cost
#4 YCD	15	12	$150,000	76	0	0	0
#6 CAA	30	16	$77,730	84	20	15	$60,000
#8 MHH	24	12	$57,000	84	16	13	$50,000
#11 AND	30	24	$206,059	80	18	14	$72,000
Total	99	64	$490,789		54	42	$182,000

PERMANENT JOBS							
	PROPOSED				RECOMMENDED		
Proponent	Enrollments	Placements	Total Cost	Score	Enrollments	Placements	Total Cost
# 1 TFS	50	45	$150,000	79	0	0	0
# 2 SFW	30	15	$140,000	85	25	20	$120,000
# 3 YCD	12	8	$90,000	69	0	0	0
# 5 BRAVA	45	36	$301,500	87	25	20	$100,000
# 7 GWI	40	32	$104,000	87	40	32	$96,000
# 9 MHH	11	8	$38,000	83	0	0	0
# 10 MHH	140	96	$144,000	69	0	0	0
Total	328	240	$967,500		90	72	$316,000

SUMMARY: Total Funds Proposed -- $1,458,289
Total Funds Available -- $500,000
Total Funds Recommended -- $498,000

Total Placements Recommended -- 114 (42 Construction & 72 Permanent)
Cost Per Placement -- $4,368 ($4,333 Construction & $4,389 Permanent)
Placement Rate -- 79% (78% Construction & 80% Permanent)

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 9, 2003

FROM: EXECUTIVE COMMITTEE

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (AGENDA ITEM 6C)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to approve the additions to the Youth Provider Vendors' List.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco (WISF) Board, ratified the Youth Council's action and on December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002 the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001 without a due date.

DISCUSSION

RFQ is a process to identify and competitively select providers of specified services for individual referrals at a quoted price. The use of an individual referral approach for securing youth services allows Youth Opportunity of San Francisco (YO! SF) staff to obtain services based on individual client need in the quantity that a particular service is needed. The RFQ process described above asked organizations to submit Statements of Qualifications. Each statement is reviewed and, if competitive and eligible to receive federal funds and provide the service(s) described, is recommended for placement on a vendors list.

Since June 27, 2002, additional potential vendors have submitted Statements of Qualifications.

RECOMMENDATION

Staff have reviewed the Statement of Qualifications submitted to the PIC, has determined the vendor to be eligible to receive WIA Title ID funds and Executive Committee recommend the vendor listed on Table 1 to be added to the Youth Vendors list.

Attachment

Table I
PIC STAFF RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
YOUTH SERVICES
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
176	**Bay Area Video Coalition** 2727 Mariposa Street, Second Floor San Francisco, CA 94110 (415) 558-2114	*YouthLink* is a high-impact program that makes a real difference in students' lives through its developmental and creative approach to technology training. Youth receive 100 hours of hands-on, project-based training in advanced skill sets in web design and production and video production, including computer hardware and peripherals, Flash animation, HTML and JavaScript coding, Dreamweaver, Illustrator, Photoshop, digital audio editing, and video production and postproduction. During the training experience, students apply their new technical skills to produce a portfolio of work including individual web pages, digital public service announcements, and online YouthZine (www.youthzine.org). To ensure that any student can enroll, *YouthLink* provides participants with stipends of $480 to take the place on needed income. Students receive training in hard and soft skills, as well as internship opportunities with local non-profit and for-profit companies. *YouthLink* training cycles are 100 hours, and take place on an after-school schedule for those youth ages 14-18 in-school and during the day for those youth ages 18-21 who are out-of-school (each cycle is three times per week, two and a half hours per day, for 11 weeks). During the summer, *YouthLink* has a shorter, more intensive schedule for both age groups (four times per week, four hours per day, for six weeks). Internships are 60 hours (10 hours per week for six weeks). Entry requirements include: Youth must be age 14-21, San Francisco resident, must fill out an application explaining their interest in the program, have a letter of recommendation from a teacher or other adult mentor, have basic computer skills, be eligible to work in the U.S., and must have parent's permission if they are under 18 (or age 18 and still in high school). Exit requirements include: Youth cannot miss more than three days of the program, must complete a web or video project, and follow program guidelines.	**$6,989**	**YES**

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, April 21, 2004
Time: 9:30 a.m. – 11:30 a.m.
Location: City Hall in Room 201
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Note: The Mayor has top priority for this conference room.

Please refer to the website for any last minute changes.

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

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AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

The Sunshine Ordinance is also available online at: www.sfgov.org/bdsupvrs/sunshine.htm

Other accommodations

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

If you require special accommodation due to a disability, contact Roberta Fazande at least 72 hours in advance at 415-923-4265,TDD 800-735-2929 (CRS) or rfazande@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Wednesday, April 14, 2004

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04-19-04P02:19 RCVD

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, APRIL 21, 2004

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the February 18, 2004 meeting *(Action Item)**
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentation by Kevin Stange (Discussion Item)**

   "Quarterly Briefing: San Francisco's Labor Market"
5. Proposed Action: Approval of Bylaw Amendment *(Action Item)*

   Proposed Bylaw Amendment: 7.2 Consent Calendar
   "The Executive Committee shall present recommendations for action to the LWIB on a Consent Calendar. Notice of Consent Calendar recommendations shall be provided with notice of meetings pursuant to section 6.3 of these Bylaws. Each member shall be entitled to affirm the action or to oppose the action to adopt the Consent Calendar recommendations.

   Each member shall review the Consent Calendar recommendations. A member shall notify the WISF Board Chief of Staff, not later than seventy-two (72) hours preceding the meeting to remove any item from the Consent Calendar for which the member cannot render a vote of yes or no. Any item so removed from the Consent Calendar shall be placed on the same meeting agenda for later action to include a full discussion and vote. "
6. Consent Calendar *(Action Item)**
   - A. Proposed Action: Ratification of PY 04-PY 06 Youth Services Request for Proposals Solicitation Framework: Calendar, Program Requirements, Program Eligibility, Performance Measures and Selection Criteria
7. Executive Committee Recommendations *(Action Item)**
   - A. Proposed Action: Ratification of One Stop System Projected Expenditure Plan for WIA Share of One Stop System Expenses PY '03-04 (July 1, 2003 – June 30, 2004)
   - B. Proposed Action: Ratification of Welfare to Work Planning Recommendations (July 1, 2004 – June 30, 2005)
   - C. Proposed Action: Ratification of Workforce Investment Act (WIA) Adult Carry Forward Funds and PY '04 Program Planning Considerations (July 1, 2004 – June 30, 2005)
   - D. Proposed Action: Ratification of Customized Training Proposals
     1. In-Home Support Services Consortium to Operate a Caregiver Skills Enhancement Project
     2. In-Home Support Services Consortium to Operate a Vocational English as-a Second-Language (VESL) Project
     3. San Francisco Chamber of Commerce to Operate the Legal Star (Skills Training and Advancement Resources Project)
     4. San Francisco Hotel Consortium/Restaurant Labor Management/Education Funds Project
   - E. Proposed Action: Ratification of Solicitation for Professional Services contract for Hope House: Ending Chronic Homelessness through Employment and Housing**
8. Program Resources Committee Recommendation (Action Item)*

Proposed Action: Approval of Funding Request for 2004 Discretionary Funds For Services to Older Refugees

9. Staff Recommendations (Action Items)*
    - A. Proposed Action: Approval of Revised "Innovations" in the One Stop Business Plan
    - B. Proposed Action: Approval of Revised WISF Board Next Steps
10. Committee Reports (Information Item)*
    - A. Finance Subcommittee
    - B. Employer Services Committee
    - C. One Stop Operations and Services Committee
    - D. Program Resources Committee
    - E. Youth Council
11. President's Report (Discussion Item)
12. Chair's Report (Discussion Item)
13. Public Testimony on Non-Agenda Items (Discussion Item)
14. Future Agenda Items (Discussion Item)
15. Adjournment *(Action Item)*

* Information enclosed.

** Information to follow.

Please note that Mayor Newsom may administer the Oath of Office to the Workforce Investment San Francisco Board Members during this meeting.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: SOLICITATION FOR PY 04-06 YOUTH SERVICES (AGENDA ITEM 6A)

ACTION REQUESTED

The WISF Board is asked to ratify the attached youth services request for proposals solicitation framework, which includes: Calendar, Program Requirements, Program Eligibility, Performance Measures, and Selection Criteria.

BACKGROUND

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval. The solicitation was released on February 27, 2004, with the following provision:

> *"This RFP is issued contingent upon subsequent approval of the Workforce Investment San Francisco Board or the PIC's Executive Committee. Should program parameters or proposal selection criteria change based on WISF Board or Executive Committee action, proponents will be notified but are strongly encouraged to frequently check the PIC web site at www.picsf.org for updates related to this RFP."*

The deadline for submission of proposals was April 6, 2004.

The Workforce Investment Act requires that local Workforce Investment Boards identify eligible providers of youth activities by awarding grants or contracts on a competitive basis, based on the recommendations of the Youth Council, to selected youth services providers to carry out youth activities consistent with requirements of the Act. In addition, the Workforce Investment Act challenges local communities, through the Youth Council, to establish a collaboration that brings together school, community organizations, training providers and others to create a comprehensive and cohesive youth services system.

The Youth Council recently concluded a strategic planning process that articulated a vision, mission and purpose of a comprehensive youth services system built on a youth development framework. The plan outlines primary and supportive strategies to achieve that vision including an emphasis on high school graduation or certification and focus on occupational preparation that leads to youth employment and a successful transition to adulthood.

The Youth Council's strategic priorities were integrated with the WIA youth services program requirements and design criteria to form a solicitation framework. That framework attempts to address both the minimum WIA requirements while encouraging proposals that contribute to the Youth Council's vision of a comprehensive and coordinated system of care. The solicitation framework was also developed to allow for the greatest possible alignment with the request for proposals planned by the San Francisco Department of Children, Youth and Their Families.

RECOMMENDATION

The Executive recommends that the WISF Board ratify the attached solicitation framework, calendar, program requirements, performance measures, and selection criteria.

Attachments

CALENDAR

EVENT	DATE
Staff Recommendations to Youth Council	February 12, 2004
Youth Council approval of RFP program design and selection criteria per WISF Board approval subject to contingencies.	February 26, 2004
Announcement and Issuance of RFP and schedule	February 27, 2004
Bidders Conference/Technical Assistance Workshop	March 4, 2004
Due date for Proposals	April 6, 2004 by 5:00 PM
Proposal review	April 6, 2004 to April 19, 2004
Joint review with DCYF & PIC Staff	April 21 – 22, 2004
PIC Staff Funding Recommendations	April 27, 2004
Youth Council Approval	May 4, 2004
Executive Committee Approval	May 12, 2004
Issue Letters of Intent to Subcontractors	Mid-May 2004
Contract Negotiations	Mid-May 2004 to June 30, 2004
* Mayor/Workforce Investment San Francisco Board (WISF) approval of Funding Recommendations	June 16, 2004
Contract Begins	July 1, 2004
First Year of Contract Ends	June 30, 2005

*The Board of Directors may be asked to act for the Private Industry Council of San Francisco, Inc. at an earlier date.

PROGRAM REQUIREMENTS

I. YOUTH COUNCIL VISION

The Youth Council's vision is that San Francisco offers a comprehensive and coordinated system of care, which provides a continuum of quality services to ensure all youth are equipped with the skills, knowledge and abilities to prepare them for successful employment, academic and life choices by age 25. The Youth Councils mission and purpose is to ensure quality, safe and healthy learning environments and opportunities, built on youth development principles, which lead to a high school diploma or certificate, and successful transitions to work or further education.

The conditions one would find in a comprehensive youth serving system include, but are not limited to:

1. Youth are aware of options/services available to them;
2. Environments for learning and services are safe;
3. Networks of support for youth are available and apparent;
4. Caring adults are involved in supporting youth to attain goals;
5. Access is present for achieving educational and employment support;
6. A continuum of care exists that supports all areas of youth development;
7. The investments made are strategic and connected to other resources;
8. Services and support are ongoing and outcome based, not time/age based;
9. Intake, referral and assessments are common and shared between agencies;
10. Neighborhoods are receiving services that address local concerns;
11. Individual service plans exist for youth and are used across agencies.

II. YOUTH DEVELOPMENT PRINCIPLES

Youth Development is the ongoing process in which all young people are engaged and invested while attempting to meet their basic personal and social needs and to build competencies necessary for successful adolescent and adult life. It is an approach, framework, and a way to think about young people that focus on their capacities, strengths and developmental needs, rather than on their weaknesses and problems. All young people have basic needs that are critical to survival and healthy development.

A. These needs include but may not be limited to:

- A sense of safety and structure
- Belonging and membership
- Self-worth and ability to contribute
- Independence and control over one's life
- Closeness and several good relationships
- Competency and mastery

B.

- *Adult Support/caring and knowledgeable Adults* – Effective youth initiatives connect young people with adults who care about them and who serve as role models.
- *Structure and Expectations* – Youth interventions must set clear and high expectations for young people while carefully supporting each young person so they can attain them.
- *Creative forms of learning* – Learning should be engaging and relevant, with curricula and teaching strategies that are creative, substantive, and attuned to the learners and to provide effective pathways to finish high school, or move into post secondary education or employment.
- *Holistic approach* – Treating individual holistically may provide sufficient protective factors to overcome a variety of risk factors, thus preventing one or more of many behavioral indications of deeper problems manifested by young people.
- *Youth as resources* – Programs should move away from focusing on eliminating youth deficits to supporting youth assets.
- *Implementing quality* – Programs clearly work better when they are thought through and well managed.
- *Follow-up Services* – Programs offering services over a long period of time, possibly many years, foster trust in youth because there is time to develop relationships with caring, knowledgeable adults.

III. PROGRAM DESIGN

A. Provide participants with an objective assessment of the academic levels, skill levels and service needs, which shall include:

- A review of basic skills
- Occupational skills
- Prior work experience
- Employability
- Interests
- Aptitudes (including interests and aptitude for nontraditional jobs)
- Supportive service and developmental needs

B. Develop service strategies for each participant that shall identify:

- For non-completers, a goal to return to Middle/High School for completion or to achieve a High School Diploma equivalency (Note: If equivalency is the goal, then the assessment must clearly explain why return to Secondary School for completion is not realistic)
- An educational goal (post-secondary education, advanced training, as appropriate).
- An employment goal (including, in appropriate circumstances, nontraditional employment)

- Achievement Goals (as appropriate: skills attainment, recognized credential relating to achievement of educational or occupational skills). Example: Job Readiness, Increase Grade Level, and Enter SAT Prep.
- Appropriate services for the participant taking into account the assessment

C. Provide for participants:
- Preparation for postsecondary education opportunities in appropriate cases
- Strong linkages between academic and occupational learning
- Preparation for unsubsidized employment in appropriate cases
- Effective connections to intermediaries with strong links to
    - The job market
    - Local and regional employers

IV. PROGRAM ELEMENTS

WIA Youth programs shall provide elements consisting of:
- Tutoring, study skills training or remedial education to address academic deficits, and instruction leading to completion of secondary school, including dropout prevention strategies
- Alternative secondary school and GED preparatory placement
- Summer employment opportunities that are directly linked to academic and occupational learning
- Paid and unpaid work experiences including internships and job shadowing
- Occupational skills training as appropriate
- Leadership development and community service opportunities which may include community service and peer-centered activities encouraging responsibility and other positive social behaviors during non-school hours, as appropriate
- Supportive services
- Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months
- Follow up services for up to twelve (12) months after completion of participation, as appropriate
- Comprehensive guidance and counseling including substance abuse, mental health and other issues as needed.

PROGRAM ELIGIBILITY

- Youth not less than 14 and not more than 21 years old
- Be authorized to work in the United States
- Males 18 and above must be registered as required under the Selective Service Act
- Meet the San Francisco Substandard Income Criteria (low-income); and
- Is an individual who is one or more of the following:
    - Basic Literacy Skills Deficient
    - Homeless or Runaway
    - School Dropout
    - Foster Child
    - Pregnant or Parent
    - Offender
    - Disabled, including learning disability
    - Individuals with educational attainment that is one or more grade levels below the grade level appropriate to the age of the individuals
    - Other locally defined barriers by the WISF Board that would require an individual additional assistance to complete an educational program or to secure and hold employment:
        1. a student enrolled in special education
        2. a student maintaining less than a "C" average
        3. a truant (one who stays out of school without permission)
        4. a person with limited English proficiency
        5. a non-custodial parent
        6. a person with a substance abuse problem
        7. a resident of an Enterprise Community
        8. a resident of public housing or member of a family receiving Section 8 rental assistance
        9. an emancipated youth
        10. a youth who has not held a job for more than 13 weeks in the last 12 months (for older youth)

PERFORMANCE MEASURES

YOUTH AGES: 14 – 18

- Attainment of basic skills and, as appropriate, work readiness or occupational skills (skill attainment = goals attainment);
- Attainment of secondary school diplomas and their recognized equivalents;
- Placement and retention in post-secondary education or advanced training, or placement and retention in military service, or employment, including qualified apprenticeship;
- Return to Middle/Secondary school

YOUTH AGES: 19 – 21

- Entry into unsubsidized employment, military service, or qualified apprenticeship;
- Retention in unsubsidized employment 6 months after entry into employment;
- Earnings received in unsubsidized employment 6 months after entry into employment;
- Return to school;
- Attainment of a recognized credential relating to achievement of educational or occupational skills;
- Entry into post-secondary education or advanced training;
- Customer satisfaction from youth and employers

SELECTION CRITERIA

	CRITERIA	POINTS
A.	**Program Design** • Emphasis on High School Completion/Employment Preparation/Entering Post- Secondary education. • Alignment with Youth Council's Strategic Priorities and the Workforce Investment Act. • Incorporation of Youth Development Principles. • Consistency with Workforce Investment Act's program design requirements • Neighborhood-based • Youth/Parental/Adult Involvement	40
B.	**Organization and Coordination** • Evidence of providing culturally competent services • Leveraging other funds for program • Ability to provide comprehensive services through formal relationships with other providers	30
C.	**Services to Priority Population** • Alignment with Youth Council's priority population (out-of-school youth; youth not on track to graduate high school; youth in juvenile justice and foster care systems; pregnant and parenting teens) • Ability to recruit WIA eligible Youth Council priority population	20
D.	**Administration and Financial Management** • Prior experiences in managing public and private grants • Program evaluation • Participant record keeping	10

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: PROPOSED EXPENDITURE PLANS FOR WIA SHARE OF ONE STOP SYSTEM AND CENTERS BUDGET PY'03 (July 1, 2003 – June 30, 2004) (AGENDA ITEM 7A)

ACTION REQUESTED

The WISF Board is asked to approve the Program Year (PY) 03-04 Draft One Stop System Projected Expenditure Plan for the WIA share of One Stop System expenses.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

The Workforce Investment San Francisco Board is required to develop and enter into a Memorandum of Understanding (MOU) with the One Stop partners concerning the operation of the one stop delivery system in the local area. The MOU must contain a provision describing how the costs of services and the operating costs of the system will be funded. The Finance Subcommittee is charged with approving this cost sharing plan, and is nearing the completion of that responsibility with cost data supplied by the various partners. The One Stop Operations and Services Committee has the oversight responsibility to review and approve the proposed expenditure plan for the WIA share of the One Stop budget for the administration and operation of the One Stop system, including continued support for the three One Stop Centers.

Earlier this Program Year, the WISF Board approved the a WIA allocation to the One Stop System in the amount of $995,713, to be used to support the activities related to the '03-'04 operation of the One Stop System.

Currently the One Stop System is operating without an approved budget, and while the cost sharing plan is not yet final and agreed to by all partners, WIA resources are necessary for the effective and efficient operation of the One Stop Centers and other System elements. Given, known and projected cost information and the amount of WIA dollars set aside for One Stop System support, staff worked with the One Stop Centers' Operator to prepare an expenditure plan for the WIA share of One Stop system expenses.

The attached expenditure plan meets both revised center expense projections and recommended system-wide costs. It should be noted that the lack of an approved budget delayed certain expenditures and therefore reflects only a portion of the annual costs of those items.

RECOMMENDATION

The Executive Committee recommends that the WISF Board ratify the attached One Stop System Expenditure Plan for the WIA share of One Stop System expensed for PY '03-04.

Attachment

Draft One Stop System Projected Expenditure Plan for WIA Share of PY 03-04 One Stop expenses

3120 Mission Street		**Original Consortium Request**	**Revised Consortium Request**	**Staff Recommendation**
Operation Cost				
Annual software licensing (PESCO Assessment, PESCO Jobskills	(5) PESCO Jobskills Assessment, Barriers to Employment Assessment	$14,000.00		
Annual Resource directory license renewal	(1) HELPLINK Online Subscription for 4/03 -4/04 @1,020, (10) single users @ $75 ea + 150.45 tax	$1,920.45		
Marketing	Center brochures	$10,000.00		**See Note A**
Customer computer maintenance	(2) laptops and (67) computers maintenance	$20,520.00		
Subtotal for this section		**$46,440.45**	**$ 47,940.45**	
Personnel				
Center Manager				
Administrative Assistant				
Computer Lab Specialist				
Universal Customer Representative				
Information & Referral Specialist				
Subtotal for this section		**$ 250,953.85**	**$ 250,953.85**	
Staff Development Activities				
Staff Training	Staff Development	$10,000.00		
Subtotal for this section		**$10,000.00**	**$ 5,000.00**	
Cost Related to Shared Space				
Facilities upgrade	Lobby area maintenance & repair	$20,000.00		
Annual rent for shared space and common areas	3120 = 8,000 sq ft (staff space, shared & common space) includes 4% annual increase	$218,460.00		
ADA improvements		$15,000.00		
Library/Resource room materials	Annual newspaper subscription, reading materials			
Supplies for the Center	Customer & center staff office supplies	$6,300.00		
Parking for handicapped customers (2 spaces)	(2) Handicapped parking spaces at 3119 Mission	$2,000.00		
Equipment expenses	Maintenance for center lobby equipment	$10,000.00		
Subtotal for this section		**$271,760.00**	**$ 266,752.35**	
TOTAL FOR 3120 MISSION		**$579,154.30**	**$ 570,646.65**	**$570,646.65**
				See Note B

Note A: Operator should ensure that individal center marketing remain consistent with unified and comprehensive marketing campaign

Note B: Actual costs, based on an adopted cost sharing plan, in an amount not to exceed $570,646.00

Draft One Stop System Projected Expenditure Plan for WIA Share of PY 03-04 One Stop expenses

		Original	Revised	
		Consortium	Consortium	Staff
1800 Oakdale Street		Request	Request	Recommendation
Operation Cost				
	Customer use computer maintenance (16) @ $380	$6,080.00		
	Replace 8 computers	$16,000.00		
	PESCO	$6,500.00		
	Helpline subscription	$2,400.00		
	Resource directory renewall license	$500.00		
	Video Professor software	$770.00		
Subtotal for this section		**$32,250.00**	**$ 29,949.89**	
Personnel				
	(1) Universal Customer Representative	$42,951.00		
Subtotal for this section		**$42,951.00**	**$ 10,737.00**	
Staff Development Activities				
	Staff training	$850.00		
Subtotal for this section		**$850.00**	**$ 4,350.00**	
Cost Related to Shared Space				
	Marketing/Outreach	$5,000.00		
	Reource Materials	$2,000.00		
	Supplies & Equipment	$3,000.00		
	Workshop Equipment	$3,096.00		
Subtotal for this section		**$13,096.00**	**$ 10,596.00**	
TOTAL FOR 1800 OAKDALE		**$89,147.00**	**$ 55,632.89**	**$ 55,632.89**
				See Note C

Note C: Actual costs, based on an adopted costs sharing plan, in an amount not to exceed $55,632.89

Draft One Stop System Projected Expenditure Plan for WIA Share of PY 03-04 One Stop expenses

801 Turk Street		**Original Consortium Request**	**Revised Consortium Request**	**Staff Recommendation**
Operations Cost				
Computer & equipment				
Customer use computer maintenance (12) @$380/yr	Customer use computer maintenance (12) @$380/yr	$4,560.00		
	Integrate (3) PCs in lobby & maintenance	$1,440.00		
	(5) PESCO	$6,500.00		
	Annual PESCO software mainentance	$700.00		
	Non-reusable workbooks & printing	$5,000.00		
Subtotal for this section		**$18,200.00**	**15,700.00**	
Personnel				
			$ -	
Staff Development Activities				
Staff Training	Staff Training	$850.00		
Subtotal for this section		**$850.00**	**$ 850.00**	
Cost Related to Shared Space				
	(30) tables & (6) chairs for conference room	$14,250.00		
	ADA improvements	$15,000.00		
Subtotal for this section		**$29,250.00**	**$ 7,500.00**	
TOTAL FOR 801 TURK		**$48,300.00**	**$ 24,050.00**	**$ 24,050.00**
				See Note D

Note D: Actual costs, based on an adopted cost sharing plan, in an amount not to exceed $24,050.00

Draft One Stop System Projected Expenditure Plan for WIA Share of PY 03-04 One Stop expenses

Projected One-Stop System Expenses 2003-2004 (1/04-6/04)		Total Requested	Revised Staff Request	Staff Recommendation
Personnel				
Operations (Service Delivery) Coordinator		$45,000.00	$ 22,500.00	$ 22,500.00
Business Liaison		$35,000.00	$ 17,500.00	$ 17,500.00
Human Resource Specialist		$35,000.00	$ 17,500.00	$ 17,500.00
Industry/Occupation/Career Specialist		$35,000.00	$ 17,500.00	$ 17,500.00
Subtotal for this section		**$150,000.00**	**$ 75,000.00**	**$ 75,000.00**
Marketing				
Phone system, 1-800 number & messaging system, listings & ad		$20,000.00	20,000	20,000
Contractual services for continue development & implementation of a marketing plan		$100,000.00	80,000	80,000
Annual event participation		$13,000.00	13,000	13,000
Technology				
Continued development/implementation of Technology Project		$150,000.00	100,000	100,000
Subtotal for this section		**$283,000.00**	**213,000**	**$ 213,000.00**
Capactiy Building Activities				
Conferences, regional plannings sessions & peer-to-peer exchanges		$16,000.00	16,000	16,000
Quality Customer Service training, team building, etc.		$16,000.00	16,000	16,000
Accessibility tools for the One-Stop system		$25,000.00	25,000	25,000
Subtotal for this section		**$57,000.00**	**57,000**	**57,000**
TOTAL FOR SYSTEM-WIDE EXPENSES		**$490,000.00**	**$345,000.00**	**$345,000.00**
GRAND TOTAL FOR CENTERS & SYSTEM		**$1,206,601.30**	**$ 995,329.54**	**$ 995,329.54**
	TOTAL FUNDS AVAILABLE	**$995,713.00**		
	Surplus		**$ 383.46**	

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATIONS FOR WELFARE-TO-WORK FUNDS FOR PY 2004 (JULY 1, 2004 TO JUNE 30, 2005) (AGENDA ITEM 7B)

ACTION REQUESTED

The WISF Board is asked to ratify an expenditure plan for welfare-to-work funds for Program Year (PY) 2004.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

On March 23, 2001, the Private Industry Council, Inc. issued a Request for Proposals (RFP) and Request for Qualifications (RFQ) for Employment and Training Services for CalWORKs, PAES and Non-Custodial Parents. This solicitation covered a three-year funding period, beginning July 1, 2001 and expiring on June 30, 2004.

In April 2003, for welfare-to-work individual referral contracting, the Workforce Investment San Francisco (WISF) Board approved, in addition to those that responded to the RFQ and those listed on San Francisco's Eligible Training Providers List (ETPL), the use of training providers approved by the California Bureau for Private Post-Secondary and Vocational Education (BPPVE),.

WELFARE-TO-WORK FUNDING SITUATION

President Bush signed the FFY 2004 Omnibus Appropriations Bill on January 23, 2004. Effective the following day, the PIC's authority to expend any remaining 1999 Formula WtW Funds was rescinded. With the loss of these funds, the PIC is no longer able to serve low-income custodial parents, former foster care youth or non-custodial parents. The PRC also regrets that due to reductions and restrictions in State and federal funds, wages in welfare to work activities are no longer able to be subsidized.

In addition, there are some activities, such as the vocational English-as-a-Second Language (VESL) Immersion Program, legal services, and MUNI training program, which the San Francisco Department of Human Services (SFDHS) will administer internally in an effort to reduce overhead and increase program effectiveness.

With the rescission of the 1999 WtW Formula Funds and the discontinuance of both State Match funds and Incentive funds, we are left with only three sources of funding available for the program year that begins July 1, 2004:

1. CalWORKs,
2. greatly reduced San Francisco General Funds, and
3. Food Stamp Employment & Training (FSET) funds.

The SFDHS has experienced a reduction in funding of $5.2 million dollars. Additionally, SFDHS has been instructed by the Mayor's office to prepare for an additional 15% reduction plan, or, a further reduction of $6.5 million dollars.

The funds available below (PY 04 – 05) covering the period July 1, 2004 through June 30, 2005, represent a ***42% funding reduction*** from PY 03 - 04.

	CW Block Grant	WtW Formula Funds	S.F. General Funds	FSET (Food Stamp Funds)	Totals
PY 03-04	$719,983	$728,460	$644,000	$276,000	$2,368,443
PY 04-05	$662,400	$0	$108,000	$612,000*	$1,382,400

*FSET was increased to leverage matching federal dollars to serve the General Assistance population.

RECOMMENDATION
To ensure:

- The highest level of customer choice,
- That training is based on the individual needs of the clients,
- That training meets the demands of the local economy, and
- That all training dollars are used (no unfilled, pre-paid training slots in classes),

It is recommended that all training be funded on an individual referral basis. It is also recommended that potential training providers be approved by the BPPVE, California Department of Education (CDE), or Chancellor's Office of the California Community Colleges (COCCC).

It is estimated that 213 persons will be served at an average cost of $6,500 per participant.

If you have any questions prior to the April 21st WISF Board meeting, please call Mike Peters, 431-8700, at PIC, or Briana Moore Wirrom, 557-5456, at SFDHS.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: WORKFORCE INVESTMENT ACT (WIA) ADULT CARRY FORWARD FUNDS AND PY'04 PROGRAM PLANNING CONSIDERATIONS (Agenda Item 7C)

ACTION REQUESTED

The WISF Board is asked to ratify an expenditure plan for $38,603 in unexpended "roll-over" funds for the WIA Adult Formula-allocated program from Program Year '03-04.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

The Workforce Investment Act (WIA) provides three annual formula allocations to San Francisco through the PIC for services to job and training seekers. These funding streams create programs for adults, dislocated workers, and youths.

With regard to the WIA Adult Formula program, for which $2,688,717 was allocated in the current year, funds are divided into three service objectives: [1] for employment and training through group subcontracts for individuals with multiple barriers to employment who are low-income, [2] for employment and training through Individual Referral (IR) subcontracts for individuals with multiple barriers to employment whose family income falls below a local Self Sufficiency Standard, and [3] for employer-matched Customized Training activities.

RECOMMENDATION

The Executive Committee recommends that the $38,603 in "carry-over" funds from the Program Year that ended June 30, 2003 be added to the Individual Referral pool to serve additional adults with individualized assessments and choice of training.

If you have questions before the April 21st WISF Board meeting, please call Brenda Brown at 923-4264, Karen Hart at 923-4260 or Wes Dixon at 923-4261.

cc: WIA Adult Subcontractors

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WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO RATIFY CUSTOMIZED TRAINING FUNDING TO THE IN-HOME SUPPORT SERVICES CONSORTIUM TO OPERATE A CAREGIVER SKILLS ENHANCEMENT PROJECT (Agenda Item 7D1)

ACTION REQUESTED

The WISF Board is asked to ratify funding in the amount of **$4,000** for In-Home Support Services Consortium (IHSS) to operate a customized training program with Arriba Juntos as the selected training provider. The total cost of the training is $8,000. The IHSS will match WIA Customized Training Funds in the amount of no less than $4,000 to train existing workers in caregiver skills enhancement.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On February 27, 2004, the IHSS and Arriba Juntos jointly submitted a proposal for funding of a Customized Training project. Based on staff's review of the proposal, the Program intends to train 40 individuals, who earn between $10.28 to $10.48 per hour. The Program is designed to teach existing home care workers job skills that are vital to job competency. Better quality of care to the IHSS patients, greater job retention and job satisfaction amongst the trainees and increase in work hours are the intended results of this training.

The duration of the course is 20 hours. The class will meet from Monday to Friday, 4 hours per day. The employer expressed good faith efforts in retaining and advancing individuals upon successful completion of the training. Advancement takes the form of more work hours. Trainees successfully completing the training are expect to earn priority for getting more work hours, thus increasing their pay. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

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RECOMMENDATION

The Executive Committee recommends that the WISF Board approve the requested **$4,000** funding for this Customized Training project.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO RATIFY CUSTOMIZED TRAINING FUNDING TO THE IN-HOME SUPPORT SERVICES CONSORTIUM TO OPERATE A VOCATIONAL ENGLISH AS-A-SECOND LANGUAGE (VESL) PROJECT (Agenda Item 7D2)

ACTION REQUESTED

The WISF Board is asked to ratify the funding in the amount of **$5,000** for In-Home Support Services to operate a customized training program with Arriba Juntos as the selected training provider. The total cost of the training is $10,000. The In-Home Support Services Consortium will match WIA Customized Training Funds in the amount of no less than $5,000 to train 25 existing workers in VESL.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On February 27, 2004, the In-Home Support Services and Arriba Juntos jointly submitted a proposal for funding of a Customized Training project. Based on staff's review of the proposal, the Program intends to train 25 individuals, who earn between $10.28 to $10.48 per hour. The Program is designed to teach existing home care workers Vocational English as-A-Second Language. As a result of better communications between the participants and the IHSS' patients, better quality of care results. Job retention and job satisfaction of the trainees will also be enhanced.

The duration of the course is 40 hours, four hours per day for ten days. The employer expressed good faith efforts in retaining and advancing individuals upon successful completion of the training. Advancement takes the form of more work hours. Trainees successfully completing the training will earn priority for getting more work hours, thus increasing their hourly wage. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

The Executive Committee recommends that the WISF Board approve the requested **$5,000** funding for this Customized Training project.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO RATIFY CUSTOMIZED TRAINING FUNDING TO THE SAN FRANCISCO CHAMBER OF COMMERCE TO OPERATE THE LEGAL STAR (SKILLS TRAINING AND ADVANCEMENT RESOURCES) PROJECT (Agenda Item 7D3)

ACTION REQUESTED

The WISF Board is asked to ratify funding in the amount of **$12,500** for San Francisco Works (SF Works, San Francisco Chamber of Commerce workforce development affiliate) to operate a customized training program with Jewish Vocational Service (JVS) as the selected training provider. The total cost of the training is $25,000. SF Works will match WIA Customized Training Funds in the amount of no less than $12,500 to train 15 existing entry-level legal support staffs in skills advancement.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On March 5, 2004, the JVS and SFWorks jointly submitted a proposal for funding of a Customized Training project. Based on staff's review of the proposal, the Program intends to train 15 individuals, who earn between $12.00 to $15.00 per hour. The Project is designed to teach existing entry-level legal support staffs job skills that are essential to job advancement. The anticipated outcomes of the training are better communication, computer and career management skills on the part of the trainees. The program will also help to address the projected labor shortage of legal administrative support.

The duration of the course is 60 hours. The employer expressed good faith efforts in retaining and advancing individuals upon successful completion of the training. Advancement takes the form of assumption of new responsibilities and wage increase. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

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RECOMMENDATION

The Executive Committee recommends that the WISF Board approve the requested **$12,500** funding for this Customized Training project.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 17, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO RATIFY CUSTOMIZED TRAINING FUNDING TO THE SAN FRANCISCO HOTEL/ RESTAURANT LABOR/ MANAGEMENT EDUCATION FUNDS PROJECT (Agenda Item 7D4)

ACTION REQUESTED

The Committee is asked to ratify the funding in the amount of **$11,300** for the San Francisco Hotel/ Restaurant Labor/ Management Education Consortium to operate a customized training program. The total cost of the training is $22,600. The San Francisco Hotel/ Restaurant Labor/ Management Education Consortium will use United Way of the Bay Area grant funds to match WIA Customized Training Funds in the amount of no less than $11,300 to train 20-25 individuals.

The Executive Committee met today, reviewed and approved the recommendations, and is now forwarding them for your approval.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On December 16, 2003, the San Francisco Hotel/ Restaurant Labor/ Management Education Consortium representing a group of eleven hotels, and the City College of San Francisco (the training provider) jointly submitted a proposal for funding of a Customized Training project. The funding was approved by the Executive Committee at its January 14, 2004 meeting.

On March 11, 2004, the San Francisco Hotel/ Restaurant Labor Management/ Education Consortium representing a group of eight hotels, and the City College of San Francisco submitted a second proposal for funding a similar training project. The only notable difference between the first training and the current proposed training is the increase in proposed cost (from $20,000 in the first proposal to $22,600 in the attached proposal). This slight increase is due an addition of 12 hours of class time.

Based on staff's review of the proposal, the project intends to train 20-25 individuals, who earn between $10.29 to $16.27 per hour. The project is designed to prepare existing persons occupying entry-level housekeeping/ stewarding jobs to advance into higher skilled and paid

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positions such as Restaurant Busser, Banquet Busser, Barback and Banquet Houseperson. The result of the training also provides a better career-ladder opportunity for participants.

The duration of the course is ten weeks and the three-hour class meets two times per week for a total of 60 hours of training. Trainees successfully completing the training are expected to either advance to a different job classification with wage increase, or are enabled to apply for and receive additional part-time, seasonal, or full-time employment in new job classifications to increase their overall annual income. The employers expressed good faith efforts in retaining and advancing individuals upon successful completion of the training. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

The Executive Committee recommends that the WISF Board ratify the requested **$11,300** funding for this Customized Training project.

If you have any questions prior to the meeting, please contact Robert Schwab at (415) 431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** APRIL 6, 2004

FROM: TRENT RHORER, PROGRAM RESOURCES COMMITTEE CHAIR

SUBJECT: FUNDING REQUEST FOR 2004 DISCRETIONARY FUNDS FOR SERVICES TO OLDER REFUGEES (Agenda Item 8)

ACTION REQUESTED

The WISF Board is asked to approve a proposal design for a request for discretionary funds for services to older refugees.

The Program Resources Committee (PRC) met today, reviewed and approved staff recommendations. The Executive Committee has not met since and is not scheduled to meet until May 12, 2004. Therefore, PRC is now forwarding its recommendations for your approval.

BACKGROUND

On March 10, 2004, Private Industry Council of San Francisco, Inc. (PIC) staff discovered through the "grapevine", that the federal Office of Refugee Resettlement had posted a State Letter on its web site announcing availability of *FY 2004 Discretionary Funds for services to older refugees.* There are $2 million dollars available nationwide, and a ceiling of $500,000 per state award. The states' deadline to apply to ORR is May 10, 2004. Knowing that there would be very little time in which to design and write a proposal to submit to the State, on March 12, 2004 PIC sent out a memorandum requesting Letters of Interest (LOI) from agencies wishing to collaborate in a proposal for older refugee services. The PIC notice was sent to agencies that currently are serving older refugees in San Francisco with these funds, entities on the RFP mailing list for refugee funds, and the Committee of Community agencies (all PIC subcontractors). The notice was also posted on PIC's web site.

Three LOIs from Jewish Family & Children's Services (JFCS), International Institute of San Francisco (IISF), and Curry Senior Center (CSC) were received by the March 19th deadline. Representatives of two of the three agencies, JFCS and IISF, attended the March 25, 2004 meeting to discuss formulating a proposal.

On March 29th, PIC received a memorandum from the State Refugee Programs Bureau (RPB) notifying counties that: *"The state will accept one funding request from each refugee-impacted county, and that request must come from the County Refugee Coordinator. Due to the limited amount of funding available this year, the RPB is providing this funding announcement to the counties that are currently providing services to elderly refugees under the FFY 2003 grant for services to older refugees."*

Funding requests are due to the RPB by **April 23, 2004**.

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PURPOSE OF FUNDING

The purpose of the funding is to help all older refugees gain access to programs and services in the community which meet their needs by:

a. establishing and/or expanding a working relationship with the State Agency on Aging and the local Area Agency on Aging to ensure that all older refugees in the community will be linked to mainstream aging services;
b. providing appropriate services to all older refugees that are not currently being provided in the community;
c. creating opportunities to enable older refugees to live independently as long as possible; and
d. developing services for, or link older refugees to, naturalization services especially for those refugees who have lost or are at risk of losing Supplemental Security Income (SSI) due to their immigration status.

According to the announcement, allowable activities include:

> ***Joint aging/refugee programs*** *– assistance to all older refugees for the purpose of accessing available aging services, such as senior community centers, supportive services, intergenerational activities, congregate nutrition services, meals delivered to homebound client residences, information and referral, outreach, escort, transportation, interpretation and translation, home care, adult day care, elder abuse prevention, nursing home ombudsman services, respite care, and chore services.*
>
> ***Citizenship and naturalization services*** *– especially naturalization services to help older refugees who have lost or are at risk of losing eligibility for Supplemental Security Income (SSI) and other Federal benefits. Allowable activities include outreach, provision of enhanced English language training, civics instruction, and counseling and application assistance including interpretation and translation. Application fees for citizenship examinations are not allowable under this announcement.*
>
> *Services provided with these discretionary funds should not duplicate or supplant services which may be available through existing Federal, State or local programs.*

RECOMMENDATION

In the last grant cycle for discretionary services to older refugees (2001), a total of $5 million was available nationwide. California received $1 million yearly for three years. San Francisco was awarded approximately $121,000, including 5% maximum ($6,000) for the PIC to administer the grant. Since the maximum state award for the FY 2004 funds is $500,000, it is possible that San Francisco's award could be decreased by half. If California is awarded the same percentage of the funds available nationwide as it currently receives (20%), San Francisco's award may only be $48,000.

The PRC recommends that the WISF Board approve a proposal design to provide citizenship and naturalization services to help older refugees who have lost or are at risk of losing eligibility for SSI. These services would be provided by two experienced older refugee service providers – JFCS and IISF.

We would also like to provide other services included in ORR's announcement and being currently provided, such as case management/supportive services, interpretation/translation, and elder abuse prevention/counseling in conjunction with the citizenship/naturalization services if at all possible, however unlikely it may be that we will receive sufficient funds for any other services.

If you have any questions before the meeting, call Karen Hart at 923-4260.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF Board Members

DATE: 14 April 2004

FROM: Pamela S. Calloway
Chief of Staff

SUBJECT: Follow-up to February Retreat

Your meeting on April 21, 2004 is the first Board meeting since the Board Retreat on February 27, 2004. The consensus on four issues reached at that Retreat was sent to you via electronic mail from Chair Lynn Bunim on March 3.

The Board agreed to review the following documents to incorporate the consensus reach at the Retreat:

1. *Innovations* – policy statements for One Stop System Business Plan
2. *Next Steps for Workforce Investment San Francisco Board* – statement of policy, priorities and work plan for the WISF Board through December 2004
3. *San Francisco Five-Year Plan* –plan for local workforce investment system that represents a local collaboration and shared understanding of the local area's workforce investment needs, vision and strategies to achieve the vision.

Two draft revised documents have been prepared for your consideration at the April 21 meeting. These documents: *Innovations* and *Next Steps for Workforce Investment San Francisco Board* are included with this memo for your review. I have also included the Summary/Consensus Statements sent to you by Lynn on March 3 and the last pre-February 27 versions of the *Innovations* and *Next Steps* documents. The task of incorporating the Retreat consensus into the *Five-Year Plan* is not on the April 21 meeting agenda.

I look forward to seeing you at the meeting next week and to our continued work to improve workforce investment in San Francisco. Please do not hesitate to contact me at 415.923.4465 if you have questions. Thank you.

Attached:

- February 27 Retreat Summary
- Innovations: January 14 version and April 14 revised draft
- Next Steps for Workforce Investment San Francisco Board: November 14 version and April 14 revised draft

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Workforce Investment San Francisco Board
Retreat on February 27, 2004

Summary

1. Issue: Priority of clients and services within the One Stop system
   The WISF Board desires universal access to the system for employers and job seekers that links and prioritizes intensive and training services to individuals with multiple barriers to employment

2. Issue: Appropriate service delivery mechanism(s) –group-based cost-reimbursement contracts and individual referral contracts
   The WISF Board will commit a portion of the training funds (dollar amount), at the beginning of the year, in a hybrid system for individual referral contracts (ITAs) and group-based contracts and reserve the rest for customized training.

3. Issue: Role of community-based organizations in One Stop System
   a. Case management and supportive services to address multiple barriers to employment, as well as specified vocational training, are effectively provided by community-based organizations (cbo-s). Contracts for services to specialized populations will ensure adequacy of targeted funding for comprehensive approaches to employment training and placement.
   b. CBO-s have demonstrated the ability to effectively leverage City, state and federal funding and reduce fragmentation and redundancies in service delivery. The Board will support such leveraged investment through informed consideration of all resources for employment and training funds throughout the City.
   c. The Board shall seek to utilize, compensate and provide incentives for linkages and collaborations among community-based organizations and other service providers.

4. Issue: Appropriate allocation of resources to One Stop centers and the One Stop system
   Design and implement a system with a *hold harmless* commitment to protect existing funding dedicated to training (dollars).

Parking Lot Issues

a. Educating the Electeds/Legislative Assistance: Change CCSF funding formula for long-term training solutions

b. Accountability Standards; more uniformity

c. Link workforce and economic development

d. Engage other funders on WISF Board: e.g. Human Rights Commission; MOCD

e. In-depth analysis of Job/labor/industry demands in the future; take to next level

f. Facilitate inter-committee dialogue/activities throughout Board

g. Determine role of WISF Board in addressing homelessness and representation in Mayor's discussion of homelessness

h. Explore models for "pooled training funds/resources" where done successfully (i.e. Boston Jobs Trust; Youth Council (PIC/DCYF)

i. Examine Youth Council model for providing incentives to community-based organizations for collaborating and linking

2004 INNOVATIONS

San Francisco One Stop Career Center System
BUSINESS PLAN '04 –'06
(ADOPTED BY WISF EXECUTIVE COMMITTEE ON JANUARY 14, 2004)

1. The WISF Board reviews and provides comments concerning the budgets of those partner funding sources identified in the WIA and other appropriate partners, in support of the challenge to maximize coordination of pubic workforce development efforts, deploy resources with integrity, and invest wisely and strategically.
2. The WISF Board reviews and provides comments on the plans of One Stop partner programs, as identified in the WIA, in response to the challenge of designing services based on objective market research and customer needs.
3. The WISF Board establishes clear standards and expectations for operating One Stop Centers, requires evidence of met expectations from the Operator(s), and evaluates options for future designation of One Stop Center Operator(s).
4. The System creates a relevant, employer-friendly capacity for an information and referral system for employer services, employing "central point of contact" and "system navigator" concepts.
5. The System establishes an income-producing division of One Stop system, based on a fee-for-service concept.
6. The System maximizes informed customer choice by providing complete information about the full range of services and financial assistance available.
7. The System launches unified and comprehensive marketing campaign to inform and attract diverse customer segments.
8. The System matches the individual customer need with appropriate service tier and service funding source to optimize customer outcomes and maximize resources.

2004 INNOVATIONS

San Francisco One Stop Career Center System

BUSINESS PLAN ’04 –‘06

[Underlined language in quotations is excerpt from the February 27 Retreat Summary. Underlined language without quotations is added for sentence structure.]

1. The WISF Board reviews and provides comments concerning the budgets of those partner funding sources identified in the WIA and other appropriate partners, in support of the challenge to maximize coordination of pubic workforce development efforts, “reduce fragmentation and redundancies in service delivery, leverage and” deploy resources with integrity, and invest wisely and strategically.

2. The WISF Board reviews and provides comments on the plans of One Stop partner programs, as identified in the WIA, “to design a service delivery mechanism” based on objective market research and customer needs, “that includes an annual investment of training funds in a hybrid system of individual training accounts, group based contracts and customized training.”

3. The WISF Board establishes clear standards and expectations for operating One Stop Centers “and Access Points, provides incentives” for and requires evidence of met expectations, and evaluates options for future designation of One Stop Center Operator(s) “and Access Points.”

4. The “One Stop” System is a relevant, employer-friendly capacity for an information and referral system for employer services, employing “central point of contact” and “system navigator” concepts.

5. The System establishes a revenue-producing division of One Stop system, based on a fee-for-service concept.

6. The System maximizes informed customer choice by providing complete information about the full range of services and financial assistance available.

7. The System includes a unified and comprehensive marketing campaign to inform and attract diverse customer segments.

8. The System is “universally accessible” and “links career services” with the individual customer need with the appropriate service tier and service funding source to optimize customer outcomes and maximize resources, “while prioritizing intensive and training services for persons with multiple barriers to employment.”

9. “Through an informed consideration of all the City’s employment and training resources, the WISF Board will support Community Based Organizations (CBOs) and other Service Providers, as necessary, to encourage a collaborative and comprehensive approach to employment training and placement services that ensures all persons with multiple barriers to employment can realize in their employment potential.”

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Next Steps for Workforce Investment San Francisco Board

(August 2003 – December 2004)

1. **Articulate Citywide workforce development priorities.**
    1. Ensure that a majority of participants served with public funding are those with multiple barriers to employment and/or dislocated workers.
    2. Maximize participants' customer choice in employment training opportunities, especially those that lead to self-sufficiency.
    3. Seek to maximize – where appropriate and possible -- utilization of City College of SF to provide cost-effective skills training and the opportunity for credentialed continuing education.
    4. Utilize, and provide compensation for, non-profit community-based organizations to provide essential supportive services (including, but not limited to, recruitment, case management, job placement, transportation, child care) to job seekers and training seekers as appropriate.
    5. Prioritize public funding of training programs that include a firm commitment from employers to hire program graduates.
    6. Assist to implement well-informed public policy changes to: (i) remove barriers to effective service delivery; (ii) improve workforce system responsiveness, efficiencies and allocations.

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2. **Achieve greater alignment of workforce development resources in addressing priorities, by coordinated action and informed decision-making through the WISF Board.**
    - **a.** Serve as the central resource in workforce development for the City and County of San Francisco.
        - **i.** WISF Board will serve as primary venue to address system-wide needs.
        - **ii.** WISF Board will serve as clearinghouse for information on workforce development and investment actions of City, state, and federal agencies involved with employment and training activities in San Francisco.
    - **b.** Leverage City, state and federal funding, and reduce fragmentation and redundancies, through informed Board consideration of all resources for employment and training throughout the City.
        - **i.** President and Chair to meet with Mayor, Supervisors, City/County agency department heads to ensure they are informed of and support the WISF Board and that at least notice of all public funds for employment and training "come through" the WISF Board.
        - **ii.** WISF Board to urge Mayor to support economic development as a priority for San Francisco, through establishment of appropriate infrastructure (economic development agency) and collaboration of relevant City agencies.
    - c. Ensure WISF Board Committees maximizes effectiveness, efficiency, and inclusion through annual articulation and review of goals and objectives. Each committee shall ensure that its decisions and recommendations are informed by current applied research.
    - d. Maintain robust research capacity to meet the needs of elected officials (local, state, national) and other policy makers as a reliable resource of comprehensive information about workforce investment in San Francisco.

3. **Create more opportunities and incentives for San Francisco's business and economic development community to influence and become a partner in workforce development efforts.**
    a. Recruit additional private sector WISF Board members to ensure a business-led Board, compliance with WIA and accomplishment of the Mayor's workforce development goals.
    b. Evaluate employer initiatives (pilot projects—e.g. customized training program): expand and institutionalize them as appropriate.
    c. Develop institutionalized capacity, and secure funding, for WISF marketing, expanded outreach, and customized services for business. Implement associated staffing needs (for example, one-stop center-based employer "System Navigators" or "account managers").
    d. Continuously engage employers in group and one-on-one meetings to ensure alignment of real business needs and WISF services, and to maximize hiring of WISF clientele.
    e. Create sector strategies to address skill shortages and career ladder opportunities.
    f. Inform development of local policy to increase private sector involvement in employment training.
    g. Showcase existing business partners.

4. **Implement a state-of-the-art One Stop System[1] and One Stop Centers[2] that reflect the Board's aspirations and investment criteria, the community's needs for services and principles of good customer service.**
    a. Develop a 2-year business plan for the One Stop System and Centers that:
        i. Sets forth a mission and vision based on the articulated consensus aspirations of the WISF Board.
        ii. Prioritizes the implementation of services in accordance with the Board's investment.
    b. Address and determine WIA allocation priorities for One Stop System elements, including training, by December 31.
    c. Timely inform appropriate allocation priorities for all One Stop partners for One Stop System.
    d. Quantify the One Stop System funding gap.

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[1] Definition of System adopted by WISF Board in September 2003
"The One Stop system represents a *subset* of workforce development and economic development programs, resources and activities that are coordinated and/or integrated for the purpose of achieving better employment and advancement outcomes for more people, more effective human resource outcomes for employers, and better linkages between the two."

[2] Definition of Center adopted by WISF Board in September 2003
Intended to be an entry point into the System for many clients, a One Stop Center is a physical place where core services (job search and placement assistance, labor market information, initial assessment of skills and needs) are provided to job and advancement seekers on-site, and where information about and *access to* all publicly subsidized job training, education and placement services is available. A One Stop Center is also a place in which employers can list job openings, and receive assistance with employee recruitment and access to upgrade training for their incumbent workforce. All clients of the Center should be able to *access* the full range of programs, resources and activities available in the One Stop System through resources available at the One Stop Center. WIA requires that there be at least one certified, comprehensive One Stop Center in each local workforce area.

5. **Create a capacity to leverage and maximize additional resources for San Francisco's workforce development system.**
    a. Develop organizational/staffing fund-raising capacity.
    b. Explore/develop fee-for-service business services to be delivered through One-Stop System.
    c. Explore/develop feasibility of central administration of Employment Training Panel funds.
    d. Explore methods to maximize utilization of resources and design appropriate accountability and evaluation measures for all training and service providers.
    e. WISF Board and President to meet with organizations to solicit financial support, including funding for innovations in San Francisco workforce development system.

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Next Steps for Workforce Investment San Francisco Board
(August 2003 – December 2004)

[Underlined language is based on February 27 Retreat Summary]

1. **Articulate citywide workforce development priorities.**
   a. Ensure universal access to the One Stop system for employers and job seekers and ensure those with multiple barriers to employment and/or dislocated workers are given priority for publically funded intensive and training services.
   b. Maximize customer choice in employment training opportunities, and ensure those opportunities are appropriate to individual customer potential and lead to self-sufficiency.
   c. Seek to maximize – where appropriate and possible -- utilization of City College of SF to provide cost-effective skills training and the opportunity for credentialed continuing education.
   d. Utilize, compensate and provide incentives for collaborations among community-based organizations and other service providers to provide essential services as appropriate.
   e. Prioritize public funding of training programs that address employer identified skills shortages and include a firm commitment from employers to hire program graduates.
   f. Implement well-informed public policy changes to: (i) remove barriers to effective service delivery; (ii) improve workforce system responsiveness, efficiencies and allocations, (iii) maintain an investment strategy of workforce preparedness that supports a thriving local economy, attracts and creates the greatest number of high quality jobs and allows all San Franciscans to achieve their employment potential.

2. **Achieve greater alignment of workforce development resources in addressing priorities, by coordinated action and informed decision-making through the WISF Board.**
   a. Serve as the central resource in workforce development for the City and County of San Francisco.
      i. WISF Board will serve as primary venue to address system-wide needs.
      ii. WISF Board will serve as clearinghouse for information on workforce development and investment actions of City, state, and federal agencies involved with employment and training activities in San Francisco.
   b. Leverage City, state and federal funding, and reduce fragmentation and redundancies, through informed Board consideration of all resources for employment and training throughout the City.
      i. President and Chair to meet with Mayor, Supervisors, City/County agency department heads to ensure they are informed of and support the WISF Board and that at least notice of all public funds for employment and training "come through" the WISF Board.
      ii. WISF Board to urge Mayor to support economic development as a priority for San Francisco, through establishment of appropriate infrastructure (economic development agency) and collaboration of relevant City agencies.
   c. Ensure WISF Board Committees maximizes effectiveness, efficiency, and inclusion through annual articulation and review of goals and objectives. Each committee shall

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ensure that its decisions and recommendations are informed by current applied research.

   d. Maintain robust research capacity to meet the needs of elected officials (local, state, national) and other policy makers as a reliable resource of comprehensive information about workforce investment in San Francisco.

3. **Create more opportunities and incentives for San Francisco's business and economic development community to influence and become a partner in workforce development efforts.**
   a. Recruit additional private sector WISF Board members to ensure a business-led Board, compliance with WIA and accomplishment of the Mayor's workforce development goals.
   b. Evaluate employer initiatives (pilot projects—e.g. customized training program): expand and institutionalize them as appropriate.
   c. Develop institutionalized capacity, and secure funding, for WISF marketing, expanded outreach, and customized services for business. Implement associated staffing needs (for example, one-stop center-based employer "System Navigators" or "account managers").
   d. Continuously engage employers in group and one-on-one meetings to ensure alignment of real business needs and WISF services, and to maximize hiring of WISF clientele.
   e. Create sector strategies to address skill shortages and career ladder opportunities.
   f. Inform development of local policy to increase private sector involvement in employment training.
   g. Showcase existing business partners

4. **Implement a state-of-the-art One Stop System[1] and One Stop Centers[2] that reflect the Board's aspirations and investment criteria, the community's needs for services and principles of good customer service.**
   a. Develop a 2-year business plan for the One Stop System and Centers that:
      i. Sets forth a mission and vision based on the articulated consensus aspirations of the WISF Board.

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        - ii. Prioritizes the implementation of services in accordance with the Board's investment strategy.
    - b. Address and determine WIA allocation priorities for One Stop System elements, including training, by December 31.
    - c. Quantify the One Stop System funding needs based on community needs and WISF priorities of universal access, informed customer choice and resource maximization and provide timely allocation and cost sharing information with all One Stop partners.

5. **Create a capacity to leverage and maximize additional resources for San Francisco's workforce development system.**
    - a. Develop organizational/staffing fund-raising capacity.
    - b. Explore/develop fee-for-service business services to be delivered through One-Stop System.
    - c. Explore/develop feasibility of central administration of Employment Training Panel funds.
    - d. Explore methods to maximize utilization of resources and design appropriate accountability and evaluation measures for all training and service providers.
    - e. Develop innovative mechanisms utilize, compensate and provide incentives for linkages and collaborations among community based organizations and other service providers.
    - f. WISF Board and President to meet with organizations to solicit financial support, including funding for innovations in San Francisco workforce development system.

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WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

WISF COMMITTEE REPORT

1. WISF COMMITTEE: Employer Services Committee

2. CHAIRPERSON: Nathan Nayman

3. MEETING INFORMATION:

Date: March 24, 2004 Time: 10:00 A.M.– 12:00 P.M..

Location: City College of San Francisco, 33 Gough Street

4. COMMITTEE MEMBERS PRESENT:

Ave Seltsam, Terri Feeley, Steve Arcelona, Nathan Nayman

5. QUORUM REACHED: Quorum was not established

6. **ACTION ITEMS:**

THE COMMITTEE VOTED TO ADOPT THE FOLLOWING RECOMMENDATION:

The Committee did not take any action.

7. **IDEAS AND TASKS IDENTIFIED FOR STAFF WORK AND/OR FUTURE MEETINGS:**

The Committee currently does not review Customized Training proposals prior to being considered by the Executive Committee. Committee Chair would like the committee members to have advanced review of the proposals prior the Executive Committee's consideration. Committee Chair asked staff to schedule monthly ESC meetings (currently, ESC only meets once every other month) to try to accommodate the proposal review process.

Chair requested staff to meet with Ave Seltsam and himself to work on the Customized Training program marketing efforts.

8. NEXT MEETING INFORMATION:

Date: April 21, 2004 Time: 12:00 P.M. – 2:00 P.M.

Location: 33 Gough Street, Auditorium

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

WISF COMMITTEE REPORT

1. WISF COMMITTEE: One Stop Committee
2. CHAIRPERSON: Rosalie Bulach
3. MEETING INFORMATION:

Date: March 1, 2004 Time: 1:00 – 3:00 p.m.

Location: City College, 33 Gough Street, Auditorium

4. COMMITTEE MEMBERS PRESENT:

William Allen, Rosalie Bulach, Jim Buick, Kathye Citron, Nicholas de Lorenzo, Devra Edelman, Phyllis McGuire, John Poremba, Victor Revenko and Darlene Rutkowski

5. TIME QUORUM REACHED: 1:14 (approximate)
6. ACTION ITEMS:

There were no formal actions requested of the Committee on the agenda; however, the Committee voted to approve the following requests:

- As a result of the discussion concerning the WISF Board Retreat, the Committee formally requested that the WISF Board Chair communicate in writing to the One Stop Committee a summary of the purpose and outcomes of the February 27th WISF Board Retreat. The summary should clearly articulate the impact, if any, of the Retreat findings on the future work of the One Stop Committee and the expectation for next steps, if any, to the One Stop Committee.
- The Committee also requested a report on the status of the One Stop Marketing Project and the work of the One Stop Marketing Workgroup to-date, as well as a report on the PIC procurement standards at the next meeting.

7. PRESENTATIONS/REPORTS:

- The Accessibility Workgroup gave a report.
- The Consortium Operator gave a report and distributed information about customer traffic at the 3120 Center.

8. IDEAS AND TASKS IDENTIFIED FOR STAFF WORK AND/OR FUTURE MEETINGS:

Promising One Stop Practices: Chair Rosalie Bulach will share information about her recent visit to the Seattle Washington WIB and One Stop system; staff will give a presentation about their peer-to-peer study of the San Diego Workforce Partnership's system.

9. NEXT MEETING INFORMATION:

Date: Due to CWA Conference April 4-6, the next meeting will be held on Monday, March 29th, 1:00 – 3:00 PM at the Career Link- Mission Center, 3120 Mission Street

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

WISF COMMITTEE REPORT

1. WISF COMMITTEE: Program Resources

2. CHAIRPERSON: Trent Rhorer

3. MEETING INFORMATION:

Date: 4/6/04 Time: 10:00 a.m.

Location: 33 Gough Street

4. COMMITTEE MEMBERS PRESENT:

Trent Rhorer, Aileen Hernandez, Michael Blecker, Brian Murphy, Terri Feeley, and Barry Hermanson

5. TIME QUORUM REACHED: 10:12 a.m.

6. ACTION ITEMS DECIDED:

- Funding Request for 2004 Discretionary Funds For Services to Older Refugees

The following items also were discussed:

- Workforce Investment Act (WIA) Adult Group Subcontracts and Individual Referral Performance Review
- Eligible Training Provider List Update
- Dislocated Workers Workgroup Report

7. IDEAS, TASKS IDENTIFIED FOR STAFF WORK AND/OR FUTURE MEETINGS:

WIA Adult funding recommendations will be discussed.

8. NEXT MEETING INFORMATION:

Date: May 4, 2004 Time: 10:00 a.m.

Location: 33 Gough

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

WISF COMMITTEE REPORT

1. WISF COMMITTEE: Youth Council
2. CHAIRPERSON: Ann Cochrane
3. MEETING INFORMATION:

Date: Thursday, February 26, 2004 Time: 4:00 PM – 6:00 PM

Location: DHS Born Auditorium, 170 Otis Street, San Francisco, CA 94103

4. COMMITTEE MEMBERS PRESENT:

Ann Cochrane, Bea Harris, Vanessa Johnson, Linda Rosel, Dana Serleth, Kar Yin Tham, Barbara Thompson, Cedric Yap

5. TIME QUORUM REACHED: 4:12 PM
6. ACTION ITEMS DECIDED:

Adoption of the minutes for the January 8, 2004 Youth Council Meeting

Adoption of PY 04-06 Youth Services Request for Proposals solicitation framework: Calendar, program requirements, program eligibility, performance measures and selection criteria as amended and approved.

Adoption of the 2004 Youth Council meeting calendar as amended.

7. IDEAS, TASKS IDENTIFIED FOR STAFF WORK AND/OR FUTURE MEETINGS:

Ann Cochrane and Robert Schwab to work on the framework of the Youth Opportunity (YO!) Program sustainability

8. NEXT MEETING INFORMATION:

Date: Thursday, March 25, 2004 Time: 4:00 PM – 6:00 PM

Location: DHS Born Auditorium, 170 Otis Street, San Francisco, CA 94103

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, June 16, 2004
Time: 9:30 a.m. – 11:30 a.m.
Location: Yerba Buena Center for the Arts
Forum
701 Mission Street
San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
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Issued: Wednesday, June 9, 2004

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, JUNE 16, 2004

1. Adoption of the Agenda *(Action Item)*
2. Approval of draft minutes from the April 21, 2004 meeting *(Action Item)**
3. Public Testimony on Agenda Items (Discussion Item)
4. Presentation (Discussion Item)

   TBA
5. Consent Calendar *(Action Item)**

The Executive Committee shall present recommendations for action to the LWIB on a Consent Calendar. Notice of Consent Calendar recommendations shall be provided with notice of meetings pursuant to section 6.3 of these Bylaws. Each member shall be entitled to affirm the action or to oppose the action to adopt the Consent Calendar recommendations.

Each member shall review the Consent Calendar recommendations. A member shall notify the WISF Board Chief of Staff, not later than seventy-two (72) hours preceding the meeting to remove any item from the Consent Calendar for which the member cannot render a vote of yes or no. Any item so removed from the Consent Calendar shall be placed on the same meeting agenda for later action to include a full discussion and vote.

   A. Proposed Action: Ratification of Design and Selection Criteria for Request For Proposals (RFP) for Refugee Targeted Assistance (TA) and Refugee Employment Social Services (RESS) Formula-Funded Programs

6. Executive Committee Recommendations *(Action Item)**
   A. Proposed Action: Ratification of Program Year 2004-05 Workforce Investment Act Allocations and Strategic Budgets
   B. Proposed Action: Ratification of PY 2004 Workforce Investment Act (WIA) Adult Training Funds' Expenditure Plan: Group Subcontracts, Individual Referral, and Employer-Directed Customized Training
   C. Proposed Action: Ratification of Customized Training Proposal -- Home Health Advocates, Inc. to Operate a Home Health Attendant Training Course
7. Youth Council Recommendations *(Action Item)*
   A. Proposed Action: Approval of Addition of Qualified Vendor to Vendors List*
   B. Proposed Action: Approval of Recommendations for WIA Title 1B Youth Service Subcontractors for Program Year 2004-2005**
8. Employer Service Committee Recommendation *(Action Item)*
   A. Proposed Action: Approval of Customized Training Proposal Review, Jewish Family and Children Services to Operate a Training Course for Home Health Aide I and Home Health Aide II*
9. Committee Reports (Information Item)
   A. Finance Subcommittee
   B. Employer Services Committee
   C. One Stop Operations and Services Committee

   D. Program Resources Committee
   E. Youth Council

10. President's Report (Discussion Item)
11. Chair's Report (Discussion Item)
12. Public Testimony on Non-Agenda Items (Discussion Item)
13. Future Agenda Items (Discussion Item)
14. Adjournment *(Action Item)*

*Information enclosed.

The Executive Committee is scheduled to meet on **Tuesday, June 15, 2004 form 8:30 a.m. to 10:00 a.m. to reconcile this item before presenting to the WISF Board on June 16th. Information will be posted on www.picsf.org as soon as it is available.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: MAY 12, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDED DESIGN AND SELECTION CRITERIA FOR A REQUEST FOR PROPOSALS (RFP) FOR REFUGEE TARGETED ASSISTANCE (TA) AND REFUGEE EMPLOYMENT SOCIAL SERVICES (RESS) FORMULA FUNDED PROGRAMS (AGENDA ITEM 5A)

ACTION REQUESTED

The WISF Board is asked to approve a refugee services RFP design and content, selection criteria, and tentative schedule. Please note that these criteria include points for coordination with the One Stop System.

The Executive Committee met, reviewed and approved Program Resources Committee's recommendations, and is forwarding the recommendations to you for your approval.

BACKGROUND

Targeted Assistance (TA) and Refugee Employment Social Services (RESS) formula funds are allocated to San Francisco by the federal Office of Refugee Resettlement (ORR) through the California Department of Social Services (CDSS) mainly for the provision of employment services for refugees who have been in the country for 60 months or less. For the past few years, the State of California has received a waiver from ORR that enables RESS-funded programs to serve those who have been in the country more than 60 months. RESS funds may also be used to provide acculturation/social adjustment services.

The Private Industry Council of San Francisco, Inc. (PIC) last issued a Request For Proposals (RFP) for refugee formula funded employment and acculturation programs in 2001. Since that RFP stipulated that subcontracts could be extended for a maximum of three consecutive years, there is now an obligation to issue a new RFP.

Available Funding

The 2004/5 Preliminary funding allocations below were received from the CDSS Refugee Programs Bureau (RPB) on May 3rd. The chart also includes final amounts from the previous three years. The 2001/02 amount is what was available in the year the last RFP was issued.

	2001/02 FINAL	2002/3 FINAL	2003/4 FINAL	2004/5 PRELIMINARY
TA	$630,305	$476,273	$340,099	$276,648
RESS	$231,736	$123,498	$97,979	$102,333
TOTAL	$862,041	$599,771	$438,078	$378,981

Please be advised that final allocation figures may not be received until August or September, and thus funding recommendations may have to be adjusted.

Refugee Community Meeting

These recommendations are informed and shaped by the May 4th PRC meeting and by a refugee community meeting that was held April 13th to discuss refugees' needs, available services and gaps in services, and the future RFP design. The agenda included discussions on refugee arrivals, refugee/asylee needs, especially relating to employment, strategies to place refugees in jobs when there are few jobs, and ideas for stretching ever-dwindling refugee formula allocations. The primary needs related to employment expressed in the meeting were:

- English language training;
- Work experience in the United States;
- The need for some refugees to change their occupation (from what they previously did in their country of origin);
- A refugee job club, where refugees can meet and share experiences;
- Basic computer skills required by virtually all employers now;
- Increased employer alliances.

RFP Design

WISF Board approval is requested for the following proposed RFP content.

Target Population

Refugee arrivals to San Francisco have slowed to a trickle, and the number of refugees receiving cash assistance has declined. At the same time, formula-funding allocations and discretionary grants have dramatically decreased. ORR priorities in provision of services are:

1. All newly arriving refugees during their first year in the U.S., who apply for services;
2. Refugees who are receiving cash assistance [Refugee Cash Assistance (RCA); Temporary Aid for Needy Families (TANF); General Assistance (GA)];
3. Unemployed refugees who are not receiving cash assistance; and
4. Employed refugees in need of services to retain employment or to attain economic independence.

The following two tables contain San Francisco arrival data from the State Refugee Programs Branch (RPB) for this current fiscal year through March, and for the previous five fiscal years. The arrival data include children and the elderly who may not be appropriate for or seeking employment services.

ARRIVALS 10/03 – 3/04

Country of Origin	#	%
Former Soviet Union	20	100%
Bosnia/Eastern Europe	0	0%
China/Southeast Asia	0	0%
Middle East	0	0%
Africa	0	0%
Latin America	0	0%
Total	20	100%

ARRIVALS 10/98 – 9/03

Country of Origin	#	%
Former Soviet Union	861	57%
Bosnia/Eastern Europe	349	23%
China/Southeast Asia	159	11%
Middle East	68	5%
Africa	63	4%
Latin America	5	<1%
Total	1505	100%

The next tables contain data for the current program year (October 1, 2003 through March 31, 2004) and the five previous years (October 1, 1998 through September 30, 2003) gathered by the current San Francisco refugee Central Intake Point (CIP). These numbers represent clients who received services through the CIP during those time periods.

CIP POPULATION 10/03 – 3/04

COUNTRY OF ORIGIN	#	%	REFUGEES	ASYLEES
Former Soviet Union	51	67%	21	30
China/SE Asia/Pacific Islands	14	18%	0	14
Africa	3	4%	1	2
Bosnia/Eastern Europe	3	4%	3	0
Middle East	3	4%	0	3
Latin America	2	3%	0	2
Total	76	100.%	25	51

CIP POPULATION 10/98 – 9/03

COUNTRY OF ORIGIN	#	%	REFUGEES	ASYLEES
Former Soviet Union	762	69.78%	608	154
China/Southeast Asia	128	11.72%	64	64
Bosnia/Eastern Europe	81	7.42%	73	8
Africa	51	4.67%	9	42
Middle East	39	3.57%	22	17
Latin America	31	2.84%	0	31
Total	1092	100.00%	776	316

Services & Training to be Solicited

- Central Intake Point (CIP)
  CIP will provide recruitment, assessment, eligibility determination, referral and tracking of refugee participants. The proponent selected to provide the CIP services will not receive any funds to provide employment and training services.
- Employment Services (ES)
  ES will provide generic job placement services consisting of, but not limited to, job readiness training, English language training, job search workshops, counseling, job development, job placement, as well as follow-up services which assist refugees in maintaining their jobs, and acculturation services if needed. Encourage employment services to include basic computer skills orientation, job clubs and unpaid work experience or work experience paid for through other funds.
- Vocational Training/Career Advancement (VT/CA)
  (Vocational Training for unemployed; Career Advancement for employed) Classroom training for specific vocations; may have concurrent Vocational English as a Second Language (VESL) instruction. Encourage vocational training to include basic computer skills orientation (if not in curriculum already), job clubs and unpaid work experience or work experience paid for through other funds.

Other Considerations

- Available dollars may not be sufficient to fund all of the above activities; if additional funds are received in the future, economic and/or immigration conditions change, we can re-consider un-funded and/or under-funded activities and worthy proposals, if any.
- The WISF Board may want to consider how it can integrate culturally competent and effective refugee services into San Francisco's One Stop employment system in the future.
- Because of the substantial cut in funds, brokerage services for individual referrals to vocational classroom training are not being recommended for solicitation at this time. In addition,

brokerage services for on the job training (OJT) are not recommended for solicitation at this time due to adverse labor market conditions and ongoing reported reticence of employers to participate in OJT programs. If additional funds are received in the future, economic and/or immigration conditions change, another narrowly focused RFP can possibly be issued.

- Services and training may be needed that can accommodate working refugees who are not yet self-sufficient; it is desirable that services and training have flexible schedules, if possible.
- Because of reduced funding, comprehensive service programs that are structured to serve a wide variety of refugees and asylees are needed.
- Programs should have a holistic approach, with other needed services and resources (such as mental health) leveraged. The WISF Board should invest in programs that are leveraging multiple funding streams and providing comprehensive services, either themselves or with partners.
- Services and training need to be compatible with CalWORKs requirements and procedures.
- It is desirable that refugee employment programs have strong, concrete connections to employers, possibly partnerships with employers. Refugee employment programs need stronger alliances with the private sector to increase placements.
- It is recommended to include an average targeted wage that minimally will equal the requirements of San Francisco's Minimum Compensation Ordinance.
- The programs and services subsequently selected for funding will make up the basis for the Refugee County Plan.

Proposed Criteria for Evaluating and Selecting Proposals

A. Training and Employment Service Components

1. Community Involvement, Coordination and Organizational Competence

   a. Community Involvement and Coordination:
   Does the proposal have the support and involvement of the proposed targeted population? Is the program (including staff) culturally and linguistically appropriate for the targeted population? Is there evidence of coordination and consultation with existing refugee and/or non-refugee employment service programs and DHS?**[10]**

   b. Organizational Competence:
   What is the extent to which the proponent has demonstrated the ability to carry out the proposed program. Includes past performance. ....**[25]**

2. Program Design and Feasibility

   a. Need:
   Does the proponent provide identifiable and quantifiable documentation that there is an established need within the refugee community for the proposed training or service? ....**[15]**

   b. For **VT/CA** components only
   Training Emphasis and Job Availability:
   Has the proponent identified training to be provided in occupations in demand in the local economy and secured job commitments from employers to hire properly trained refugees within a specific time-frame? Will this training lead to career advancement in the targeted occupation(s) by providing skills upgrades for those

who are working? ....[**15**] or

For **ES** component only
Job Search Emphasis and Job Availability:
Has the proponent identified job search emphases that are consistent with local labor market demand and has the proponent secured job commitments from employers to hire properly trained refugees within a specified time-frame? ......[**15**]

c. Feasibility and Comprehensiveness of Services:
How well is the program design developed and described? Are the proposed program strategies and goals feasible given the resources, personnel, and target population? Are the goals realistic, given past performance, if any? Has recruitment of eligible refugees and asylees been adequately addressed? Are all of the identified needs of refugees and asylees addressed with the proposed services or leveraged services? Does the proposed program include work-related acculturation services and worker rights information, interaction with the One Stop system, and adequate English language training and other services, such as work experience, job clubs, basic computer skills orientation if needed for target population? ....[**20**]

3. Program Cost and Leveraging:
What is the total program cost; cost per person served; cost per placement. Extent to which other funds are leveraged to support the program. Extent to which the proposed scale of the program is appropriate to the projected demand for the program. .... [**15**]

B. Central Intake Point (CIP)

1. Community Involvement, One Stop System Coordination and Organizational Competence

a. Community Involvement and Coordination:
Does the proposal have the support and involvement of the proposed targeted population? Is there evidence of coordination and consultation with existing refugee/asylee and/or non-refugee employment service programs and with DHS? ....[**10**]

b. One Stop System Involvement and Coordination
Is there evidence of coordination with and effective use of the San Francisco workforce development One Stop system? .... [**5**]

c. Organizational Competence:
The extent to which the proponent has demonstrated the ability to carry out the proposed program. Includes past performance. .... [**25**]

2. Program Design and Feasibility

a. Design and Feasibility:
Does the proposal detail all required component activities? Are the proposed program strategies feasible given the available resources? ....[**25**]

b. Equitable Referral:
Does the proposal describe how referrals will be made to the refugee service

providers on an equitable basis?..**[15]**

c. Other Information:
Does the proposal describe the coordination and linkages with DHS in referring mandatory refugees for cause determination, compliance review, and/or sanctioning? Does the proposal include other linkages that will be used in the delivery of the CIP services? ....**[5]**

3. Program Cost and Leveraging
Is the proposed dollar amount reasonable in terms of the proposed services and available resources? What is the extent to which other funds are leveraged to support the program?..**[15]**

Tentative Schedule

May 4	Program Resources Committee (PRC) considers recommendations for Refugee RFP design and selection criteria.
May 12	Executive Committee, acting on behalf of the WISF Board, approves PRC Refugee RFP design and selection criteria recommendations.
June 8	RFP issued.
July 6	Proposals due at the PIC.
July 27	Staff recommendations mailed to PRC and proponents.
Aug. 3	PRC reviews staff funding recommendations and hears public testimony.
Sept. 15	Executive Committee, acting on behalf of the WISF Board, approves PRC funding recommendations. (The Executive Committee does not have an August meeting scheduled and the WISF Board does not have a meeting scheduled in August or September.)
Sept. XX	Board of Supervisors approves Refugee County Plan.
Oct. 1	Refugee programs begin.

RECOMMENDATION
The Executive Committee recommends that the WISF Board ratifies the recommended refugee services RFP design and content, selection criteria, and tentative schedule.

If you have any questions before the June 16th WISF Board meeting, please call Karen Hart at 923-4260.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MAY 12, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: PROGRAM YEAR 2004-05 WORKFORCE INVESTMENT ACT ALLOCATIONS AND STRATEGIC BUDGETS (AGENDA ITEM 6A)

ACTION REQUESTED

The WISF Board is asked to implement local priorities by approving a Workforce Investment Act (WIA) strategic budget for the Program Year beginning July 1, 2004.

BACKGROUND

On April 26, 2004, the Finance Subcommittee approved funding for the “hold harmless” dollars to be provided next year for *WIA Training/Participant Support* ($5,018,797). These direct services dollars are one of three categories of cost for which decisions are needed.

The two remaining categories of cost are *dollars for PIC* and *dollars for One Stop infrastructure*.

- *dollars for PIC* are both PIC *Administration* and PIC *Operations* costs;
- *dollars for One Stop infrastructure* are both *Center* and *System* costs.

Please note that the WIA allocation for One Stop infrastructure represents the contributions of just one partner (PIC) and just one funding stream to the overall operation of the One Stop system.

The recommendations below do not hold the One Stop infrastructure funding harmless. To be clear, these recommendations propose that certain PIC employees who are assigned to coordinate One Stop activities or work directly in the Centers be moved to the *WIA allocation* of the One Stop budget. They should no longer be included in the PIC budgets as part of its Operations costs, but instead should be charged in the *One Stop infrastructure* budget, where they currently served.

The One Stop Committee will determine its priorities at a later date. Consideration of those priorities, and the funding to pay for them should include all sources of funding and partners, of which the WIA allocation is one.

RECOMMENDATION

Mayor Newsom has repeatedly stated that he will make every effort to balance the City/County budget with as little diminution to direct services as is possible. Executive Committee remains intent on carrying out the Mayor's emphasis on direct services. A total of $300,848 fewer WIA dollars will be available in PY'04-05—none of that cut is taken from training services.

Executive Committee recommends that 54% ($162,995) of the decrease be cut from *PIC Administration* and *Operations* budget and 46% ($137,853) be cut from the *One Stop Center/System infrastructure* budget.

If you have questions before your meeting, please call Adrian Trujillo or Wes Dixon at (415) 923-4003.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MAY 12, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: PY 2004 WORKFORCE INVESTMENT ACT (WIA) ADULT TRAINING FUNDS' EXPENDITURE PLAN: GROUP SUBCONTRACTS, INDIVIDUAL REFERRAL, AND EMPLOYER-DIRECTED CUSTOMIZED TRAINING (Agenda Item 6B)

ACTION REQUESTED

The WISF Board is ask to approve the distribution of direct service funds for adult services and amounts for WIA Group, Individual Referral, and Customized Training subcontracts for Program year 2004-2005 (July 1, 2004 to June 30, 2005).

BACKGROUND

On April 8, 2004, the California EDD announced local allocations of WIA Adult, Youth and Dislocated Worker Funds. San Francisco will receive an allocation amount of $7,658,504 for Program Year 2004-05, an overall 3.78% reduction from the current year. The following chart shows the breakdown of WIA Formula allocations to San Francisco:

WIA ADULT	WIA YOUTH	WIA DISLOCATED WORKER	TOTAL ALLOCATION
$2,585,881	$2,337,056	$ 2,695,567	$7,658,504

The Finance Committee met April 26th and implemented the Board's "hold harmless" of training and participant support funds available for Adult Job Seekers ($1,751,005) and for Dislocated Workers ($1,726,124).

Adult Formula Considerations

Current Adult subcontracts were solicited by Request for Proposal in April 2003. The PRC met on May 4th to review staff recommendations and consider three different scenarios for funding of WIA Adult services for low-income individuals with barriers to employment. Recommendations were based on nine months of performance data, Subcontractors' Self Evaluations, and the Workforce Investment Board's direction to prioritize programs that include:

- High Performing Subcontractors
- Training in Demand Occupations
- Training programs combined with English as a Second Language
- Placements into jobs with wages above the San Francisco Minimum Wage Ordinance
- Service to low income geographic areas with an emphasis on the Southeast sector

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RECOMMENDATIONS

WIA Adult Formula Allocation

Group Subcontract Training

After a lengthy discussion and substantial public testimony, the Executive Committee recommends WIA Adult Formula funding as shown on Option 1 (Chart A, attached) with the provision that any PY'03-'04 Customized Training funds not obligated on July 1, 2004 be divided equally between the Individual Referral Pool and the Participant Support Pool. In addition, the PRC respectfully recommended that the Employer Services Committee consider funding the Jewish Vocational Service program out of the $300,000 reserved for Customized Training.

Individual Referral Training

Program year 02/03 was the first year of funding the Individual Referral (IR) Program with WIA Adult dollars for individuals with barriers to employment whose family income falls below a local self-sufficiency standard. The Workforce Investment San Francisco Board approved $125,000 for the Individual Referral Program that resulted in twenty-five participant enrolled in training; twenty-three completed training, eighteen are employed and two remain in training.

In Program year 03/04, $229,919 was allocated to the IR Program. As of today, forty participants are enrolled in training (with eight contracts negotiation); four participants have completed training and are currently employed; thirty-six participants remain in training.

The Executive Committee recommends the continuation of the Individual Referral Program that targets individuals with barriers to employment with an emphasis on individuals that reside in the Southeast sector of the city.

Customized Training

This is the first year of a pilot program for employer-matched Customized Training. At least forty-one participants are officially enrolled. At this time in the pilot, participants are beginning training and very little data exist to evaluate the effectiveness of the model.

The Executive Committee recommends continued funding at the same amount as the current year, with a thorough evaluation after eighteen months of pilot performance data (after December 31, 2004).

WIA Dislocated Worker Formula Allocation

The Executive Committee recommends that the Dislocated Workers Program funds continue to be directed to Individual Referral Training subcontracts for off the shelf, customer-chosen training with ETPL-listed training providers.

If you have questions before your meeting, please call PIC staff members Brenda Brown at 923-4264 or Wes Dixon at 923-4261.

Chart A

	Option # 1			
PY-2004/2005 WIA Adult Programs	# Participants	Subcontract	Training Set Aside	**PY-04/05 Recommended Budget**
Computer Skills				
Intercultural Institute of California (IIC)/ESL	20	$ 81,819		$ 81,819
Mission Lang. & Voc. School (MLVS)/ESL	18	$ 65,966		$ 65,966
San Francisco Vocational Services (SFVS)	9	$ 57,644		$ 57,644
Constructions & Cabinet Making				
Asian Neighborhood Design (AND)	10	$ 53,393		$ 53,393
Trustees of Glide Foundation	8	$ 38,948		$ 38,948
Food Preparation Service				
Haight Ashbury Food Program (HAFP)	12	$ 76,853		$ 76,853
Health Careers				
Self Help for the Elderly (SHE-HHA)/ESL	9	$ 42,503		$ 42,503
Arriba Juntos (AJ)/ESL	26	$ 109,445		$ 109,445
Housekeeping				
Self-Help for the Elderly (SHE)/ESL	36	$ 147,408		$ 147,408
Intensive Services				
Positive Resources	10	$ 37,916		$ 37,916
Customized Training				
Jewish Vocational Service *	12	$ 31,139	$ 22,464	$ 53,603
On-the-Job Training				
Arriba Juntos (AJ)/ESL	28	$ 87,450	$ 74,084	$ 161,534
No. Calif. Service League (NCSL)	22	$ 86,432	$ 39,759	$ 126,191
Swords to Plowshares (STP)	18	$ 65,002	$ 19,500	$ 84,502
Sub-Total	**226**	**$ 950,779**	**$ 133,343**	**$ 1,084,122**
Customized Training				$ 300,000
Individual Referrals	38			$ 191,316
Participants Support				$ 175,567
Over-all Training Funds	**264**			**$ 1,751,005**

** Recommend JVS' program to Employer Services Committee for funding from PY04/05 CT pool.*

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MAY 12, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO APPROVE CUSTOMIZED TRAINING FUNDING TO HOME HEALTH ADVOCATES, INC. TO OPERATE A HOME HEALTH ATTENDANT TRAINING COURSE (AGENDA ITEM 6C)

ACTION REQUESTED

The WISF Board is asked to approve the funding in the amount of $6,000 for Home Health Advocates, Inc. to operate a customized training program with Arriba Juntos as the selected training provider. The total cost of the training is proposed at $12,000. Home Health Advocates, Inc. will match WIA Customized Training Funds in the amount of no less than $6,000 to train 15 participants in basic Home Health Attendant skills.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. A third party trainer selected by the employer typically provides the training. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On April 9, 2004, the Home Health Advocates, Inc. and Arriba Juntos jointly submitted a proposal for funding of a Customized Training project.

On April 21, 2004, the Employer Services Committee reviewed the proposals and heard a presentation from Alex Saldarriaga, the owner of Home Health Advocates, Inc. Although a quorum was not established at the meeting, Committee members unanimously agreed to recommend this project for funding.

The Program intends to train a total of 15 individuals, that are a combination of existing workers who earn between $9.00 and $10.00 per hour, and unemployed individuals. It is designed to teach participants specialized skills necessary to work successfully as Home Health Attendants in a firm that distinguishes itself with more highly-trained personnel. The specialized training prepares Home Health attendants to more effectively deal with difficult patients, recognize patient distress or medical disorders sooner, and provide a higher level of patient services and attention than is generally available in the industry.

The duration of the course is 30 hours, six hours per day for five days. The employer expressed good faith efforts in advancing individuals upon successful completion of the training. Advancement may take the form of higher pay and/or more work hours or, in the case of those who were unemployed prior to training, hiring of individuals upon completion. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

The Executive Committee recommends that the WISF Board approve the requested $6,000 funding for this Customized Training project.

If you have any questions prior to the meeting, please contact Robert Schwab at (415) 431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE**: MAY 27, 2004

FROM: YOUTH COUNCIL

SUBJECT: ADDITION OF QUALIFIED VENDORS TO VENDORS LIST (AGENDA ITEM 7A)

ACTION REQUESTED

The WISF Board is asked to approve the additions to the Youth Provider Vendors' List.

BACKGROUND

On November 15, 2001 the Youth Council approved the program design elements, evaluation criteria and schedule for a combined Request for Proposals (RFP) and Request for Qualifications (RFQ) solicitation.

On December 14, 2001 the Executive Committee, on behalf of the Workforce Investment San Francisco, (WISF) Board, ratified the Youth Council's action and on December 17, 2001 staff issued the RFP and RFQ.

On July 10, 2002, the WISF Executive Committee ratified the June 27, 2002 action of the Youth Council to issue a continuous solicitation of statements of qualifications containing the same design elements, program requirements, and selection criteria as the RFQ issued on December 14, 2001, without a due date.

RECOMMENDATION

Staff have reviewed all Statements of Qualifications submitted to the PIC, has determined the vendors to be eligible to receive WIA Title 1D funds and the Youth Council recommends the vendors listed on Table I to be added to the youth vendors list.

Attachment

YOUTH COUNCIL RECOMMENDATIONS
WORKFORCE INVESTMENT ACT (WIA)
YOUTH SERVICES
ADDITION TO THE INDIVIDUAL REFERRAL VENDOR LIST

#	Proponent	Proposed Activity	Unit Price	Approved
177	**AcademyX** 601 Montgomery Street, Ste 601 San Francisco, CA 94111 (415)392-8024	**Web Designer Program** is a three month, two nights per week training program. The program includes practical information about creating dynamic web sites, obtaining clients and search engine optimazation.Class size is limited to eight students. Each student gets their own PC and workstation during the class. Instructor mentoring, follow-up support and guidance will be provided. Class schedule is Monday and Wednesday evening from 6-9pm; students learn how to use HTML, Dreamweaver, FrontPage, Flash and Photoshop.	$1,950	YES
		Web Developer Program is a three month, two nights per week training program. The program includes practical information about creating dynamic web sites, obtaining clients and search engine optimazation.Class size is limited to eight students. Each student gets their own PC and workstation during the class. Instructor mentoring, follow-up support and guidance will be provided. Class schedule is Tuesday and Thursday evening from 6-9pm; students learn how to use HTML, ASP, JavaScript, PHP, Coldfusion, SQL and Access.	$1,950	YES
178	**Streetside Stories, Inc.** 1360 Mission St., Suite 200, Rm. 8 San Francisco, CA. 94103 (415)864-5221	Literacy arts courses given after school or as summer courses, designed to meet the needs of young people struggling to transition into or complete high school and to attain basic literacy. The curriculum uses theater performance and creative writing in order to build students' self-esteem, motivation, critical thinking and academic skills. Each course will meet for 1.5 hours once a week for four weeks. The program addresses Title 1D program elements by building stong peer relationships among youth and mentoring relationships with course facilitators, and by using a curriculum that emphasizes peer support and group work.	$1,000	YES
179	**Poor Magazine** 255 9thStreet San Francisco, CA. 94103 (415)863-6306	The Digital Resistance/POOR Press program is designed to provide basic skills, drop-out prevention, work readiness, customized occupational training, education and internships in media, multi-media and publishing to to low-income and/or homeless youth. Publishing of art and media are used as a catalyst to inspire, engage and educate youth faciing barriers to education and employment. Classes meet Tuesday and Thursday after school 4-7PM. Program cycles are for 12 weeks.	$2,200	YES
180	**Poor Magazine** 255 9thStreet San Francisco, CA. 94103 (415)863-6306	Subsidized Internships that act as a companion to the POOR Press/Digital Resistance Program at POOR Magazine. When each youth graduates the training program (12 weeks) they would be able to particpate in paid internships at POOR (10 hours per week) at $10.00 per hour. Each internship includes on-the-job training in advanced design and publishing applications as well as "work experience" and portfolio development. Internships last for three months. Each student would be acting as a classroom mentor to other youth participants as well as creating an on-line and print publication for POOR Magazine.	$1,900	YES

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MAY 26, 2004

FROM: EMPLOYER SERVICES COMMITTEE

SUBJECT: RECOMMENDATION TO REVIEW JEWISH FAMILY AND CHILDREN SERVICES' CUSTOMIZED TRAINING PROPOSAL TO OPERATE A SKILLS ENHANCEMENT TRAINING PROJECT FOR HOME HEALTH AIDES (AGENDA ITEM 8)

ACTION REQUESTED

The WISF Board is asked to approve the funding in the amount of $18,000 for Jewish Family and Children's Services (JFCS) to operate an in-house customized training program. The total cost of the training is proposed at $36,000. JFCS will match WIA Customized Training Funds in the amount of no less than $18,000 to train 70 participants in advanced Home Health Aide skills.

The Employer Services Committee met and reviewed the proposal. Although a quorum was not established, Committee members unanimously agreed to recommend this project for funding.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost.

On May 5, 2004 JFCS submitted a proposal to PIC for funding of a Customized Training project.

Based on staff's review of the proposal, the Program intends to train 70 individuals. Of the 70 individuals, 50 are new hires and will be trained as Home Health Aides I, earning $9.25 per hour prior to the training. Another 20 individuals are existing Home Health Aides I who earn $9.75 to $10 per hour. The Program is designed to teach participants the advanced skills necessary to work successfully as Home Health Aides I and II. Participants' skills will be enhanced to increase marketability resulting in an increase in wages. Participants will also be more aware of issues that this occupation typically faces and acquire the knowledge to deal with them appropriately. After successful completion of the training program, the new hires will be advanced to Home Health Aide I with wage increase to $10.00 per hour, and the existing Home Health Aide I will be advanced to Home Health Aide II with a wage increase to $10.50 per hour.

Ten participants will be trained at a time; each participants training is 10 hours long. The employer expressed good faith efforts in advancing individuals upon successful completion of the training. Advancement takes the form of wage increases. As a result of the above observations, staff believes that the proposal meets all the requirements outlined in the Customized Training policy.

RECOMMENDATION

Employer Services Committee recommends that the WISF Board approve the requested $18,000 funding for this Customized Training project.

If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

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MINUTES OF THE
JUNE 16, 2004 MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held at Yerba Buena Center for the Arts in the Forum located at 701 Mission Street in San Francisco, California.

PRESENT:
William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley

ABSENT:
Michael Blecker, Rosalie Bulach, Anni Chung, Kathye Citron, Kimberly Cousin, Philip Day, Theresa Feeley, Gregg Fortner, Phyllis Jackson, Nate Mason, Sonia Melara, Brian Murphy, Craig Newmark, John Poremba, Ave Seltsam, Erika Thorson-Garay, and Stan Warren

STAFF:
Alice Chiu, Cathy deCristofaro, Wes Dixon, Karen Hart, Raymond Holland, Zenaida Paguirigan, Emma Perez, Mike Peters, Robert Schwab, Adrian Trujillo, and Judith Villamor

PUBLIC (AS EVIDENCE BY SIGN-IN SHEET):
Lorraine Giordano, Carol Harlow, Greg Johnson, Henry Lau, Mark Mak, Dean Osdia, and Spencer Tolliver

The meeting was convened at 9:39 AM with a quorum present.

Motion to adopt the agenda was made by Victor Revenko and seconded by Leslie Luttgens.
Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley
Nays: None
Abstentions: None
Motion passed.

Motion to adopt the minutes of the April 21, 2004 meeting was made by Victor Revenko and seconded by Abby Snay.
Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley
Nays: None
Abstentions: None
Motion passed.

Chair Bunim commented that there has been quite a bit of attention on what's happening in the southeast sector of San Francisco. She introduced and congratulated Dwayne Jones on his appointment as Director of the Mayor's Office of Community Development. Mr. Jones was formerly a Director of Young Community Developers.

Dwayne Jones gave a brief presentation about the Leadership Initiative. The Initiative is a collaboration between the PIC, Inc., the Mayor's Office of Community Development, Brothers Against Guns, Together Untied Recommitted Forever, and Young Community Developers. The purpose of the collaboration is to provide successful interventions and opportunities, linked to appropriate services and supports that offer gang-involved youth a realistic path to a productive, self-sufficient lifestyle free of violence and criminal activity.

This efforts intends to intervene in the lives of selected young people who are leaders in neighborhoods based on conflicts by providing intensive all day conflict resolution, anger management, life skills and job readiness, combined with recreational opportunities and transitional employment. The concept relies on the continuity of a single mentor throughout the experience, a consistent message of non-violence and respect, services provided in a sage neutral location and a guarantee of quality, fulltime employment for participants who fulfill their obligations outlined in an individual contract and successfully complete the program. The "go live" date for the Initiative is Monday June 21st.

Mr. Jones encouraged to Board to embrace this initiative by providing the successful participants creative entry-level jobs.

Mr. Jones also spoke briefly about Project Connect. The Mayor's Office of Community Development, joined by YO! SF and other City workers, led a door-to-door campaign to confront despondency and invest in people living in San Francisco's poorest neighborhoods hot hardest by the rising tide of violence. The program reaches out to residents to learn their needs for services to enable the City to redirect resources to sill any gaps in city-provided services. The effort was launched last week in Sunnyvale.

Item 5 – Consent Calendar

Ratification of Design and Selection Criteria for Request For Proposals (RFP) for Refugee Targeted Assistance (TA) and Refugee Employment Social Services (RESS) Formula-Funded Programs

Motion to adopt the Consent Calendar was made by Ann Cochrane and seconded by Aileen Hernandez.

Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, and Dan Whooley

Nays: None

Abstentions: Abby Snay

Motion passed.

Chair Bunim asked the Members to complete the Conflict of Interests Forms.

Item 6 – Executive Committee Recommendations

A. Ratification of Program Year 2004-05 Workforce Investment Act Allocations and Strategic Budgets

Chair Bunim asked that Item 6A and Item 7B, *Approval of Recommendations for WIA Title 1B Youth Service Subcontractors for Program Year 2004-2005*, be considered together as Item 7B modifies Item 6A.

Pamela Calloway explained that Item 6A are recommendations from the Executive Committee on the allocation of WIA funds on May 12th. Subsequently, the Youth Council met on May 27th and made youth funding recommendations that conflicted with the Executive Committee May 12th decision. The Executive Committee met yesterday to resolve that conflict and presents its resolution for the Board's approval.

Ann Cochrane presented a brief overview of the Executive Committee recommendations. The Executive Committee recommends that the WISF Board:

1. Ratify the Executive Committee decision to fund WIA Title 1B Youth Service subcontractors for program year 2004-05 as indicated on Table 1-Option B;
2. Authorize the issuance of an additional $265 thousand solicitation for proposals to serve youth residing in Bayview/Hunters Point, Oceanview-Merced-Ingleside (OMI), Sunnydale and Western Addition; and
3. Authorize staff to jointly negotiate contracts with DCYF ensuring an appropriate maintenance of effort and budget alignment to maximize youth service coordination.

Ms. Cochrane also presented a brief background of the recommendations. The Youth Council held meetings on May 4 and May 27 to discuss funding recommendations with the public. Well over 100 people attended each of these meetings, many of whom provided passionate testimony about the increased need for youth services in San Francisco this year. At the May 4 meeting, members of the Youth Council noted that the Review Team recommendation presented by staff did not include any youth services providers in the Oceanview-Merced-Ingleside (OMI) neighborhoods. At the May 27 Youth Council meeting, three funding options were presented to the Youth Council for consideration (these Options and the Review Process for Proposals is Attachment One to the memorandum). One of these options, Option C, requires the Executive committee to reduce the WIA youth funding contribution to the One Stop System by $200 thousand, direct this $200 thousand to service providers in OMI, and increased the funding to recommended providers in Bayview and Sunnydale. The Youth Council adopted Option B (which does not include any youth service providers in OMI); and further recommends to the Executive Committee that all the youth formula funding to support the One Stop System be used instead as the subject of a new solicitation for youth services exclusively for services to youth residing in the Bayview Hunters Point, OMI, Sunnydale and Western Addition neighborhoods.

Ms. Calloway added that this is an issue of how to best serve youth (either through One Stop or through direct services). She also added that this is a one-time request.

Ms. Cochrane added that the Youth Council encouraged proponents to have or continue partnership with the One Stop.

William Allen asked what is the impact of these recommendations on the One Stop and what role does the One Stop play. He was concerned that the chair of the One Stop Committee [Rosalie Bulach] was not present to speak on behalf of the One Stop Committee. Chair Bunim replied that the Executive Committee, at its meeting yesterday, tried to look at the whole picture from a 10,000 feet level. She added that it was Ms. Bulach who suggested that if youth were not served at the One Stops, then to give the money back for youth services. She also added that the Board is only discussing the WIA contribution to the One Stop and not other partners' contributions.

Victor Revenko commented that better data is needed in the future for accountability and how best to serve our clients whether it's youth, adults, or employers. Robert Schwab commented that the Youth Council held discussions and decided that youth are not best served at the One Stop Center. Services for youth required intensive assessment, a full case plan, and case management. The One Stop is not well equipped to deliver those kinds of services nor was that its intention.

Darlene Rutkowski expressed her concern about taking money away from One Stop marketing and information technology.

Abby Snay commented that the Board need to prioritize its delivery and nature of services.

Public Testimony
Spencer Tolliver of Youth Chance High School asked that the scoring system be clarified. He also expressed his concerns on the impact of the recommendations on the One Stop. However, he encouraged the Board to adopt the recommendations and to find an alternative system for youth services.

Carol Harlow of YMCA echoed Mr. Tolliver's comments and added that the Tenderloin should be added as one of the targeted neighborhoods in the second RFP. Tenderloin also has been affected by the violence.

Motion to adopt Item 6A as modified by Item 7B was made by Ann Cochrane and seconded by Leslie Luttgens.
Ayes: Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Trent Rhorer, and Dan Whooley
Nays: Darlene Rutkowski
Abstentions: William Allen, Victor Revenko, Tom Ryan, Dana Serleth and Abby Snay
Motion passed.

B. Ratification of PY 2004 Workforce Investment Act (WIA) Adult Training Funds' Expenditure Plan: Group Subcontracts, Individual Referral, and Employer-Directed Customized Training
Pamela Calloway presented a brief overview of Executive Committee's recommendation to approve the distribution of direct service funds for adult services and amounts for WIA Group, Individual Referral, and Customized Training subcontracts for Program year 2004-2005 (July 1, 2004 to June 30, 2005).

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

William Allen asked if a quorum was present. Lynn Bunim replied that a quorum is present. Pamela Calloway added that the quorum is adjusted to reflect the vacancies on the Board.

Motion to adopt the recommendation was made by Leslie Luttgens and seconded by Ann Cochrane.
Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie

Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley

Nays: None

Abstentions: None

Motion passed.

C. Ratification of Customized Training Proposal -- Home Health Advocates, Inc. to Operate a Home Health Attendant Training Course

Pamela Calloway presented a brief overview of Executive Committee's recommendation to approve the funding in the amount of $6,000 for Home Health Advocates, Inc. to operate a customized training program with Arriba Juntos as the selected training provider to train 15 participants in basic Home Health Attendant skills.

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt the recommendation was made by Ann Cochrane and seconded by William Allen.

Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley

Nays: None

Abstentions: None

Motion passed.

Item 7 – Youth Council Recommendation

Approval of Addition of Qualified Vendor to Vendors List

Ann Cochrane presented a brief overview of Youth Council's recommendations to approve the additions to the Youth Provider Vendors' List.

William Allen asked for a quorum call. Dana Serleth offered, according to Robert Rules of Order, that "once a quorum is established, it remains in effect until the meeting is adjourned".

Motion to adopt the recommendation was made by Dana Serleth and seconded by Curt Kirschner.

Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley

Nays: None

Abstentions: None

Motion passed.

Item 8 – Employer Services Committee Recommendations

A. Approval of Customized Training Proposal Review, Jewish Family and Children Services to Operate a Training Course for Home Health Aide I and Home Health Aide II

Nathan Nayman presented a brief overview of the Employer Service Committee's recommendation to approve the funding in the amount of $18,000 for Jewish Family and Children's Services (JFCS) to operate an in-house customized training program to train 70 participants in advanced Home Health Aide skills.

Motion to adopt the recommendation was made by Leslie Luttgens and seconded by William Allen.

Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley
Nays: None
Abstentions: None
Motion passed.

Mr. Nayman thanked staff for their work in the customized training proposals.

Chair Bunim thanked all the Committees and staff for their hard work.

Item 10 – President's Report

Pamela Calloway presented a comprehensive report on local initiatives to address workforce and community needs, legislative news, and new partnership and funding opportunities. The Mayor unveiled his $4.89 billion budget proposal for FY 2004-05 and stated that he will protect vital services to the most vulnerable populations while bringing forth major reforms in city government. The city faces an estimated $352 million deficit in its general fund. The proposal represents a series of tough choices and shared sacrifices including layoffs of city workers, increased business taxed, consolidated city departments and cuts in public health programs. The proposal also increases the total number of summer jobs and youth employment training slots for San Francisco youth.

Ms. Calloway informed the Board that Virgin Airlines recently announced plans to base operations for its new low-cost airline, Virgin America, at San Francisco Airport. This is expected to result in as many as 1500 jobs for local mechanics, pilots, flight crews and others. The PIC is working closely with San Mateo WIB to ensure that Virgin America's workforce needs are met. Governor Schwarzengger has provided substantial workforce training funds to Virgin through State's Employment Training Panel funds.

She also gave a brief legislative update.

Public Testimony on Non Agenda Items

There was none.

Motion to adjourn was made by Victor Revenko and seconded by William Allen.

Ayes: William Allen, Lynn Bunim, Pamela Calloway, Ann Cochrane, Nicholas de Lorenzo, Sally Gallegos, Linda Grohe, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Victor Revenko, Trent Rhorer, Darlene Rutkowski, Tom Ryan, Dana Serleth, Abby Snay and Dan Whooley
Nays: None
Abstentions: None
Motion passed.

The meeting was adjourned at 11:20 AM.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A SPECIAL PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date: Wednesday, September 15, 2004
Time: 2:00 p.m. – 4:00 p.m.
Location: Community College District Office
Auditorium
33 Gough Street
San Francisco, CA 94103

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

KNOW YOUR RIGHTS UNDER THE SUNSHINE ORDINANCE
(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

The Sunshine Ordinance is also available online at: www.sfgov.org/bdsupvrs/sunshine.htm

Other accommodations

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.
If you require special accommodation due to a disability, contact Roberta Fazande at least 72 hours in advance at 415-923-4265,TDD 800-735-2929 (CRS) or rfazande@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Tuesday, September 7, 2004

SPECIAL MEETING
DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, JUNE 16, 2004

1. Adoption of the Agenda *(Action Item)*
2. Public Testimony on Agenda Item (Discussion Item)
3. First Source Hiring Administration Legislation (Discussion/Possible Action Item)*
4. Public Testimony on Non-Agenda Items (Discussion Item)
5. Adjournment *(Action Item)*

*Information enclosed.

COMPARISON AND EXPLANATION OF FIRST SOURCE HIRING PROGAM AMENDMENTS

Section 83.4(d)
Original: Contract, grant and loan threshold is at $200,000. Sole Source contracts are excluded from First Source
Amendment: Threshold is lowered to $50,000. Sole source contracts are included in the program.
Rationale: Because the program is seen as a benefit for employers, it should be extended to as many employers as is reasonable which would also increase the number of potential jobs.

Sec. 83.4(F)
Original: Residential development is not included.
Amendment: Residential development is included.
Rationale: At the time the original ordinance was passed, most residential construction was taking place in redevelopment areas which had employment programs. Now, much of the large private sector development is residential and there is no reason not to include it in the program

Sec. 83.4 (s)
Original: not applicable
Amendment: defines "residential development" as being 10 units or more.
Rationale: based on the standard used for the "inclusionary housing ordinance".

Sec. 83.6(b)(9)
Original: annual report required.
Amendment: provides specific points that must be covered in the annual report
Rationale; to assure completeness and clarity in the reports

Sec. 83.6 (d)
Original: prohibited imposition of any fee on developers
Amendment: removes the prohibition; see Section 83.11
Rationale: removed so that fee can be assessed. See section 83.12 (a)

Section 83.7 (d)

Original: gave the purchaser discretion to determine which contracts he/she thought were feasible to apply FSH requirements.

Amendment: treats the Purchaser like every other department

Rationale: the original reason given for the exception was that the Purchaser awarded some contracts that were performed outside of the Bay Area. But the ordinance only applies to work performed in or around San Francisco or on City property.

83.9(b)(2)

Original: 10 day limit on time given to FSHP to fill job requests.

Amendment: remove the limit

Rationale: this would allow for more flexibility between the FSHP and the employer.

83.11

Original: allowed the developer to obtain approval of their First Source Hiring Program after the Planning Commission had granted conditional approval

Amendment: requires the developer to obtain the approval of the First Source Hiring Administration of the FSH Agreement before the Planning Commission grants approval of a project.

Rationale: this will allow the Planning Commission to consider the impact on employment when it is considering developments, and provide a forum for the community to comment.

83.12 (a)

Original: not included

Amendment: includes a fee schedule for commercial and residential developers; the fees are related to the size of the project.

Rationale: to defray the costs of administering that part of the program relating to the FSHA approval of commercial and residential development permits.

FILE NO. ORDINANCE NO.

[Expanding the first source hiring program to apply to: 1) sole source contracts, 2) contracts, loans or grants in excess of $50,000, and 3) residential projects; increasing the First Source Hiring Administration's reporting requirements; deleting Purchaser's obligation to determine applicability of ordinance to certain service contracts; deleting ten-day limit on interviewing requirements; requiring developers to obtain first source hiring agreement before City can approve development or issue applicable permit, imposing fee schedule on covered entities, and extending the operative date of the ordinance to January 1, 2009.]

Ordinance amending the San Francisco Administrative Code by amending sections 83.4, 83.5, 83.6, 83.7, 83.9, 83.11, and by adding section 83.12A to: (1) expand the definition of contract to include sole source contracts and contracts, loans and grants awarded by the City in excess of $50,000; (2) include residential projects, as defined herein, to be subject to first source hiring requirements; (3) increase the First Source Hiring Administration's reporting requirements to the Mayor and the Board of Supervisors regarding the progress of the first source hiring program; (4) delete the requirement that the Purchaser shall determine the applicability of the first source hiring requirements to certain service contracts; (5) delete the ten-day limit on the first source interviewing requirement; (6) require developers to obtain a first source hiring agreement or an exemption before the Planning Commission may approve development projects or other City departments may issue permits subject to first source requirements; (6) impose a fee schedule on covered entities; and (7) extend the operative date to January 1, 2009.

Note: Additions are *single-underline italics Times New Roman*;
deletions are ~~*strikethrough italics Times New Roman*~~.
Board amendment additions are double underlined.
Board amendment deletions are ~~strikethrough normal~~.

Be it ordained by the People of the City and County of San Francisco:

Section 1. The San Francisco Administrative Code is hereby amended by amending Sections 83.2, 83.3, 83.4, 83.5, 83.6, 83.7, 83.9, 83.11, and 83.18, and by adding Section 83.12A to read as follows

SEC. 83.2. FINDINGS.

(a) In August 1996, a new federal law, the Personal Responsibility and Work Opportunity Act, also known as "welfare reform," fundamentally changed the nature of public assistance programs in this country, shifting the focus from the receipt of benefits to procurement of employment within specified time limits. Approximately 17,350 of San Francisco's children and 7,330 of its adults (3.4 percent of the population) who currently receive Temporary Assistance to Needy Families (TA~~I~~NF), the program formerly known as Aid to Families with Dependent Children (AFDC), will be limited to five cumulative years of aid during their lifetime. This means that within five years, the adult members of these families, unless specifically exempted, must be employed at an economically self-sufficient level. Under the new federal law, after two years on aid, most recipients must work in order to maintain eligibility for TA~~I~~NF. As families reach their time limits, there will be no federal or State funding help to support them. Therefore, the creation and retention of adequate employment opportunities within the City is essential to prevent these families from falling into complete destitution.

(b) The federal law will penalize states that fail to meet their assigned quotas for moving individuals from welfare to work by imposing monetary sanctions that will be passed on to the counties. ~~*It is estimated that failure by the City to meet its work force participation goals would cost $2.33 million the first year, and $3.27 million the second year.*~~

(c) Many people on welfare and other economically disadvantaged individuals do not have immediate access to employment opportunities that will bring economic self-sufficiency. Often, long-term recipients of public benefits are confronted with multiple barriers to full employment, including lack of education, job-readiness skills and work experience.

(d) ~~*Between 1990 and 1993, San Francisco lost over 37,500 jobs, including scores of well-paying blue collar positions, particularly in manufacturing.*~~ *In San Francisco, there are 9,000 single unemployed adults in the County Adult Assistance Program (CAAP) who are also in need of programs to move toward self-sufficiency. Many CAAP clients have chosen an employment track and are pursuing self-sufficiency through work. Unlike TANF, CAAP is funded solely by county dollars and is not subsidized by the State or federal government.*

~~(e)~~ *While the economy shows signs of improvement, unemployment rates in San Francisco remain at 5.8 percent. Since 2000, over 100,000 jobs have been lost, almost three times the job loss rate of the early 1990's.*

(~~e~~*f*) The welfare time limits imposed upon families place tremendous pressure on the City to find jobs, provide appropriate training opportunities, and assist economically disadvantaged individuals to find and retain adequate employment. The availability of sufficient employment opportunities is essential to the economic and social well-being of the City. This process of workforce development must be a component of the City's economic development planning.

(~~f~~*g*) New development and construction of commercial projects tend to increase property values which in turn can displace low-income residents and put a greater burden on the City to assist economically disadvantaged individuals.

(~~g~~*h*) Additionally, business expansion places increased demand upon, and reduces the available pool of, qualified workers. The City's economic health depends upon the maintenance of that pool. Job training funds are a component of welfare reform and will result in an increase of available qualified workers. Thus, early identification of entry level positions in new or growing commercial activity allows the City to plan training programs that will prepare economically disadvantaged individuals to be available for these new jobs. One of the goals of this Chapter is to create a seamless job referral system.

(~~h~~i) The City, the business community, the service providers, organized labor, the schools, and the people who must personally meet the challenge of welfare reform are gathering at a unique historical moment. The time limits on public assistance are a matter of law, and the only choice is to organize the opportunities so as not to bypass these workers. The consequences of welfare reform are significant not just for the individuals who must find economic self-sufficiency, but for the whole economic well-being and commercial activity of the City and its constituents.

(~~i~~j) The concept of "First Source Hiring" under this Chapter contains two essential components: the identification of entry level positions in order to properly allocate training resources, and the availability of the first opportunity for graduates of those training programs to be considered for employment. The City must work with the business community, the service providers, organized labor and schools in identifying workforce needs, developing job readiness standards, supporting training that creates a new pool of qualified workers, and providing a mechanism by which the business community can draw upon this pool; thereby facilitating and strengthening the relationship between the City, community-based job training, development and place-mended programs, and the private sector. While the City commits to providing the support services necessary to ensure the successful transition to economic self-sufficiency, the business community must be willing to offer these employment opportunities to qualified economically disadvantaged individuals.

(~~j~~k) Participation in the City's First Source Hiring Program can be economically advantageous to employers. The Program ~~is expected to~~ provides a ready supply of qualified workers to employers with hiring needs. There are a variety of City, federal and State tax credits available for hiring qualified economically disadvantaged individuals. ~~*The City offers a New Jobs Hiring Tax Credit to businesses that create new, permanent jobs, or relocates existing jobs to the City, of 100 percent against the City's payroll tax for the first year, and 50 percent for the second. Businesses that create summer jobs for economically disadvantaged youth are eligible for a 50 percent credit against the City's payroll tax.*~~ Within State-designated "Enterprise Zone" areas of San Francisco, ~~*businesses that create new jobs for qualified individuals are eligible for a gradually declining payroll tax credit, beginning at 100% for the first two years, and available for a total of ten years*~~ *the state offers a hiring tax credit for employers who hire job seekers from targeted groups. Employers can claim up to $31,605 in tax credits over a 5 year period when they hire qualified employees*. The State of California also allows a hiring tax credit against wages paid qualified economically disadvantaged individuals, and a sales tax credit for equipment purchased *for use* in designated Enterprise Zones.

(~~*k*~~*l*) In order to provide financial assistance to employers who hire qualified economically disadvantaged individuals, the federal government offers the Federal Welfare-to-Work Credit *that provides up to $8,500 in tax credits per qualified employee* and the Work Opportunity Tax Credit *that provides up to $2,400 in tax credits per qualified employee*.

(~~*l*~~*m*) The City is committed, in partnership with the Private Industry Council, to facilitating employer access to tax credit and other financial incentive information regarding the hiring of qualified economically disadvantaged individuals who meet City, State or federal program criteria. (Added by Ord. 264-98, App. 8/21/98)

(n) The Board of Supervisors passed the FSHA before Congress passed the Workforce Investment Act of 1998 (WIA) (29 U.S.C.A. 2801 et seq.). The WIA mandates the creation of a

Workforce Investment Board (WIB) that, in partnership with the Mayor, oversees the workforce development system for the City.

(o) The WIA also requires the implementation of a One-Stop delivery system that provides services to both job seekers and employers. It requires that the workforce development services in each locality be delivered through a single "One-Stop" delivery system. The WIA gives states and localities flexibility in deciding how to implement the One-Stop system with the condition that a "full service center" be formed in each locality, which provides full access to all services. The WIB, in partnership with the Mayor, agreed to have one full service center located on Mission Street, two affiliate centers located in the southeast sector and in the Civic Center area, and a multitude of access points. This structure makes up the foundation of the One-Stop system in San Francisco. The City chose a consortium of agencies to be responsible for the operation of these centers, including the San Francisco Department of Human Services, City College of San Francisco, the National Council on Aging, and the State of California Employment Development Department.

(p) With the passage of the WIA and the implementation of the One-Stop system, the FSHA has been fully integrated into the delivery of services.

(q) In 2003, the FSHA ordinance was extended for one year, during which time an independent evaluation was conducted on the effectiveness of the program. The final report indicates that the stakeholders view the ordinance as a tool to open doors to jobs for populations that have historically had difficulty gaining access to employment opportunities.

(r) In March 2004, DHS began implementing a business service initiative designed to integrate job posting and placement activities within the One-Stop system. With this new referral system in place, a process exists to connect job seekers with the job opportunities that result from this ordinance.

(s) Also in 2004, DHS implemented a new data system that tracks the activities of the referral system. Information gathered includes the number of employers notified of first source requirements, the number that comply with first source requirements, the number of jobs posted, and the number of job seekers referred and placed in jobs.

SEC. 83.3. PURPOSE.

The purpose of this Chapter is to establish a First Source Hiring Program for the City and County of San Francisco to foster construction and permanent employment opportunities for qualified economically disadvantaged individuals. Participation in this program shall be required in City contracts and city property contracts.

This Chapter additionally requires similar first source hiring obligations to be included in permits authorizing construction of certain commercial development *and residential* projects.

Because of the wide variety of contracts, and property contracts entered into, and permits issued by, the City, there is no single first source hiring requirement that can be applied and enforced in all such contract and permit situations. Therefore, specific first source hiring requirements must be tailored to individual contracts, property contracts, and permits for commercial activities. An administrative body shall be established by the City to assist in the tailoring of these requirements, and shall be known as the "First Source Hiring Administration" (FSHA) for the purpose of implementing and overseeing the first source hiring requirements under this Chapter.

This Chapter is intended to authorize and direct the First Source Hiring Administration, where consistent with the purpose of this Chapter and its assessment of feasibility, and in a manner that avoids conflicts with applicable federal and State law, to set entry level position hiring and retention goals for contracts, property contracts and permits.

Nothing in this Chapter is intended to, nor shall it be interpreted or applied so to create delay to~~, or impose a monetary exaction upon,~~ _contractors or_ developers under permits subject to the requirements of first source hiring.

Three years after the effective date of this Chapter, the Board of Supervisors shall review the First Source Hiring Program to determine: 1) the number of entry level positions identified and acquired by qualified economically disadvantaged individuals; 2) whether participants in the Workforce Development System received appropriate and sufficient training; 3) whether the requirements of this Chapter are adequate to achieve the goals of the program; and 4) whether amendments and/or revisions of this Chapter are needed. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.4 DEFINITIONS.

(a) "Approved Plan" shall mean a first source hiring implementation and monitoring plan developed by a City department and approved by the FSHA. ~~*Once a department's overall plan has been approved by the FSHA, the department is not required to seek authorization from the FSHA for individual contracts, property contracts or permits unless otherwise instructed to do so in the approved plan.*~~

(b) "City" shall mean the City and County of San Francisco.

(c) "Commercial Activity" shall include retail sales and services, restaurant, hotel, _education,_ office uses, and other commercial uses.

(d) "Contract" shall mean an agreement for public works or improvements to be performed, or for goods or services to be purchased, or grants to be provided, at the expense of the City, or to be paid out of moneys deposited in the Treasury of the City, or out of trust moneys under the control of, or collected by, the City involving an expenditure in excess of

$350,000 for construction contracts, and in excess of $~~*200,000*~~*50,000* for services. Contract shall also mean loans or grants in excess of $~~*200,000*~~*50,000* which are awarded by the Mayor's Office of Housing, the Mayor's Office of Community Development, the Mayor's Office of Children Youth and their Families, or by any other City department *for work covered under this Chapter*.

The requirements of this Chapter shall apply to: (1) entry level positions for work performed on the contract in the City; (2) entry level positions for work performed on the contract in counties contiguous to the City; and (3) entry level positions for work performed on the contract on property owned by the City.

For purposes of this Chapter, "Contract" shall include subcontracts under the contract subject to first source hiring, unless otherwise exempted under this Chapter.

For purposes of this Chapter, "Contract" shall not include contracts for urgent litigation expenses as determined by the City Attorney, emergency contracts under San Francisco Administrative Code §6.30, or §21.25, ~~*sole source contracts*~~, tolling agreements, cooperative purchasing agreements with other governmental entities or contracts with other governmental entities.

(e) "Contractor" shall mean any person(s), firm, partnership, corporation, or combination thereof, who enters into a contract or property contract with a department head or officer empowered by law to enter into contracts or property contracts on the part of the City.

(f) "Developer" shall mean the property owner, agents of the property owner, including but not limited to management companies, person or persons, firm, partnership, corporation, or combination thereof, having the right under the San Francisco Planning Code and/or the San Francisco Building Code to make an application for approval of a commercial activity *or residential project.*

(g) “Development Project” shall mean commercial activity(ies) *or a residential project* that require~~s~~ a ~~P~~*p*ermit that is subject to the requirements of this Chapter.

(h) “Economically disadvantaged individual” shall mean an individual who is either: (1) Eligible for services under the ~~*Job Training Partnership Act, 29 U.S.C. §1503*~~ *Workforce Investment Act of 1998 (WIA) (29 U.S.C.A. 2801 et seq.)*, as determined by the San Francisco Private Industry Council; or (2) designated “economically disadvantaged” by the First Source Hiring Administration, as an individual who is at risk of relying upon, or returning to, public assistance.

(i) “Employer” shall mean a contractor, subcontractor, developer, agents of the Developer, tenants or other occupants, or person(s), firm, partnership, corporation, or combination thereof engaged in ~~*the commercial activity(ies) in the development project, who is*~~ *work performed under a contract, lease, loan, grant, or permit* subject to the requirements of this Chapter.

(j) “Entry level position” shall mean a non-managerial position that requires either: (1) no education above a high school diploma or certified equivalency; or (2) less than two years of training or specific preparation; and shall include temporary and permanent jobs, and construction jobs related to the development of a commercial activity.

(k) “First source hiring agreement” shall mean the written agreement entered into by the employer with the City which details the particular first source hiring requirements with which an employer must comply, as further defined in Sections 83.9 and 83.11 of this Chapter.

(l) “FSHA” shall mean the First Source Hiring Administration.

(m) "Permit" shall mean, during Phase I, as defined in Section 83.4(n) below, either or both of the following: (1) any building permit application for a commercial activity over

50,000 square feet in floor area and involving new construction, an addition, or alteration which results in the expansion of entry level positions for a commercial activity; (2) any application which requires discretionary action by the City's Planning Commission relating to a commercial activity over 50,000 square feet including, but not limited to, a conditional use, project authorization under San Francisco Planning Code Section 309, and office development under San Francisco Planning Code Section 320, et seq.

During Phase II, as defined Section 83.4(o) below, either or ~~*both*~~*all* of the following: (1) any building permit application for a commercial activity over 25,000 square feet in floor area and involving new construction, an addition, or alteration which results in the expansion of entry level positions for a commercial activity; (2) any application which requires discretionary action by the City's Planning Commission relating to a commercial activity over 25,000 square feet including, but not limited to conditional use, project authorization under San Francisco Planning Code section 309, and office development under San Francisco Planning Code Section 320, et seq.*, or (3) any building permit application for a residential project as defined herein.*

The requirements of this Chapter shall apply to entry level positions for work done under a permit authorizing a development project *or residential project* in the City.

(n) "Phase I" shall refer to the first stage of implementation of this Article which ~~*shall become*~~ *became* operative *on October 20, 1998.*~~*30 days after the ordinance adopting this Chapter becomes effective, and shall apply*~~ *Phase I applied* to contracts for public works or improvements to be performed, property contracts, grants or loans issued by the Mayor's Office of Housing, or by the Mayor's Office of Community Development, and permits issued for commercial activity over 50,000 square feet.

(o) "Phase II" ~~*shall*~~ refer*s* to the second stage of implementation of this Chapter which ~~*shall become*~~ *became* operative *on April 1, 2001,* 24 months after the *FSHA* adopt~~*ioned*~~*ed* ~~*of*~~ a resolution ~~*by the FSHA*~~*stating* that Phase I ha~~*s*~~*d* been implemented~~*, and*~~*. In addition to the contracts, property contracts, grants or loans referred to in section 83.4(n), above, Phase II* shall apply to contracts for services in the amount of $~~*200,000*~~*50,000*~~*, contracts for the procurement of goods, materials equipment or supplies as determined by the Purchaser under Section 83.7(d) of this chapter,*~~ permits issued for commercial activity exceeding 25,000 square feet; ~~*and*~~ grants and loans in excess of $~~*200,000*~~*50,000* issued by other City departments~~*.*~~*, and permits issued for residential projects as defined herein.*

(p) "Property contract" shall mean a written agreement, including leases, concessions, franchises and easements, between the City and a private party for the exclusive use of real property, owned or controlled by the City, for a term exceeding 29 days in any calendar year (whether by a singular instrument or by cumulative instruments) for the operation or use of such real property for the operation of a business establishment, that creates available entry level positions. For purposes of this Chapter, "property contract" does not include an agreement for the City to use or occupy real property owned by others, or leases, easements or permits entered into by the Public Utilities Commission for pipeline rights of way property and watershed property.

(q) "Publicize" shall mean to advertise or post, and shall include participation in job fairs, or other forums in which employment information is available.

(r) "Qualified" with reference to an economically disadvantaged individual shall mean an individual who meets the minimum bona fide occupational qualifications provided by the prospective employer to the San Francisco Workforce Development System in the job availability notices required by this Chapter.

(s) *"Residential project" shall mean a residential development involving new construction, an addition, a conversion, or substantial rehabilitation that results in the creation or addition of ten or more residential units.*

(~~s~~*t*) "Retention" shall, when used in this Chapter, be construed to apply to the entry level position, not to any particular individual.

(~~t~~*u*) "San Francisco Workforce Development System ("System")" shall mean the system established by the City and County of San Francisco, and managed by the FSHA, for maintaining: (1) a pool of qualified individuals; and (2) the mechanism by which such individuals are certified and referred to prospective employers covered by the first source hiring requirements under this Chapter. (Added by Ord. 264-98, App. 8/21/98)

(v) "Substantial rehabilitation," when used in this Chapter, shall mean rehabilitation that involves costs in excess of 75 percent of the value of the building after rehabilitation.

SEC. 83.5 SCOPE.

The requirements of this Chapter shall apply to: (a) entry level positions for work performed on the contract in the City; (b) entry level positions for work performed on the contract in counties contiguous to the City; (c) entry level positions for work performed on the contract on property owned by the City; and (d) entry level positions for work done under a permit authorization on a development project in the City. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.6. FIRST SOURCE HIRING ADMINISTRATION.

(a) **Establishment and Composition**. A First Source Hiring Administration ("FSHA") is hereby established for the purpose set forth in Subsection (b) below. The FSHA shall consist of the following: (1) the Mayor or his/her designee from the Mayor's Office of Economic Development; (2) the Executive Director of the Department of Human Services, or his/her designee; (3) the Director of the Mayor's Office of Community Development, or his/her designee; (4) the President of the Private Industry Council, or his/her designee; (5) other City department representatives appointed by the FSHA as necessary from time to time; and (6) other San Francisco governmental agency representatives participating in the First Source Hiring Program and invited by the FSHA .

(b) **Powers and Duties**. The FSHA shall be responsible for the implementation, oversight, and monitoring of the first source hiring requirements of this Chapter. Its powers and duties shall include:

(1) Providing assistance to individual City departments in designing first source hiring implementation and monitoring plans for that department to use in contracts and property contracts, including criteria for assigning particular numerical hiring goals, or reviewing and approving existing Plans. The FSHA shall work with departments to identify those contracts and property contracts that offer available entry level positions in duration and numbers sufficient to justify the additional administrative duties resulting from the implementation of the requirements of this Chapter. To the greatest extent possible, the development of these plans shall utilize the department's existing contract-monitoring procedures and facilitate a coordinated flow of information;

(2) Working with the Department of City Planning and the Department of Building Inspection to establish conditions based upon first source hiring agreements for development projects;

(3) Working with employers and unions to identify entry level positions for qualified economically disadvantaged individuals, and to set appropriate recruitment, hiring and retention goals;

(4) Managing the San Francisco Workforce Development System;

(5) Determining appropriate monitoring and enforcement mechanisms to achieve the purpose of this Chapter, and consistent with Sections 83.10 and 83.12, below;

(6) Developing written regulations to implement first source hiring;

(7) Entering into cooperative agreements with other San Francisco governmental agencies, including, but not limited to, the Housing Authority, the Redevelopment Agency, the In-Home Supportive Services Public Authority, and the Parking Authority, consistent with the laws governing such agencies and consistent with the purpose of this Chapter;

(8) Conducting independent audits of City departmental implementation, monitoring and enforcement of the requirements of this Chapter;

(9) Preparing an annual report on the progress of first source hiring for presentation to the Mayor and the Board of Supervisors~~,~~ *that will include but not be limited to the status of first source implementation by all City departments, the number of contractors subject to first source requirements by department, the number and percent of contractors with signed first source agreements on file, the number and percent of first source employers posting jobs, the number of jobs posted and the wage data associated with those jobs, the number of job seekers referred to employers, the number of job seekers hired by first source employers and the number and percent of first source employers hiring job seekers. The Board of Supervisors shall hold a hearing on the report within 45 days of its submission to the Clerk of the Board of Supervisors.*

(10) Submitting all approved first source hiring implementation and monitoring plans ("approved plan") to the Workforce Development Advisory Committee for review;

(11) Developing effective outreach, education, support services for, and recognition of, employers.

(c) The FSHA shall phase-in implementation of this Chapter in accordance with Section 83.18, below, and as defined in Sections 83.4 (n) and (o), above. The FSHA shall first establish a schedule for assisting in the development of, or approving existing first source hiring implementation and monitoring plans by the following City departments: Airport; Department of Building Inspection; Department of Planning; Department of Public Health; Mayor's Office of Children, Youth and Families; Mayor's Office of Community Development; Mayor's Office of Housing; Municipal Railway; Parks and Recreation; Port; Public Works, and Purchasing. The FSHA shall also establish a schedule for the remaining City departments.

(d) The FSHA shall exercise its powers and duties in a manner that does not result in delay~~, *or impose a monetary exaction under permits,*~~ *for contractors or developers* subject to this Chapter.

(e) The FSHA shall make the final administrative determination as to compliance with the requirements of this Chapter. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.7. DUTIES OF CITY DEPARTMENTS.

(a) All commissions, departments, officers and employees of the City shall cooperate with the FSHA in connection with their respective duties relative to the award of contracts, property contracts, and the issuance of permits subject to this Chapter.

(b) City departments shall develop an overall first source hiring implementation and monitoring plan ("plan") with the assistance of the FSHA. Once the FSHA approves the plan ("approved plan"), the department is not required to seek approval from the FSHA for specific contracts, property contracts or permits unless otherwise instructed to do so in the approved plan. If a department is required to comply with federal or state hiring program regulations that meet or exceed the requirements of this Chapter, that department shall submit that information as its plan. Compliance with such regulations shall be deemed to be an "approved plan." Compliance by a department with the approved plan shall be deemed to be compliance with the requirements of this Chapter. The FSHA may require regular reports by the department as part of the plan.

(c) In situations where both the Departments of Building ~~*i*~~*I*nspection and Planning grant approval for a development project, the City's Department of Planning shall have primary jurisdiction for the conditions imposed on the permit required under this Chapter, and the role of the Department of Building Inspection shall be limited to assisting in enforcement of the first source hiring requirements.

~~*(d) The Purchaser shall determine which contracts for the procurement of goods, materials, equipment or supplies to which it is feasible to apply the first source hiring requirements of this Chapter, and, in consultation with the FSHA, shall develop first source hiring criteria for inclusion in invitations to bid and requests for proposals. The successful bidder or respondent shall enter into a first source hiring agreement.*~~ (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.8. WORKFORCE DEVELOPMENT ADVISORY COMMITTEE.

There shall be established a Workforce Develop-mended Advisory Committee ("Advisory Committee") to advise the FSHA on workforce development, employ-mended needs, program policy, design, implementation, oversight, and monitoring. This advisory committee shall be appointed by the Mayor and shall include representatives of community-based organizations, labor, the business community, and City departments. The members of this advisory committee shall serve at will for a term of one year, and may be reappointed. This Advisory Committee shall meet at least quarterly. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.9. FIRST SOURCE HIRING REQUIREMENTS FOR CONTRACTS AND PROPERTY CONTRACTS.

(a) This Chapter applies to all contracts and property contracts, except where the FSHA determines that application of the requirements of this Chapter is not feasible or conflicts with applicable federal or State law.

(b) As an essential term of, and consideration for, any contract or property contract with the City, not exempted by the FSHA, the contractor shall enter into a first source hiring agreement ("agreement") with the City, on or before the effective date of the contract or property contract. Such agreement shall:

(1) Set appropriate hiring and retention goals for entry level positions. The employer shall agree to achieve these hiring and retention goals, or, if unable to achieve these goals, to establish good faith efforts as to its attempts to do so, as set forth in the agreement. The agreement shall take into consideration the employer's participation in existing job training, referral and/or brokerage programs. Within the discretion of the FSHA, subject to appropriate modifications, participation in such programs may be certified as meeting the requirements of this Chapter. Failure either to achieve the specified goal, or to establish good faith efforts will constitute noncompliance and will subject the employer to the provisions of Section 83.10 of this Chapter.

(2) Set first source interviewing, recruitment and hiring requirements, which will provide the San Francisco Workforce Development System with the first opportunity to

provide qualified economically disadvantaged individuals for consideration for employment for entry level positions. Employers shall consider all applications of qualified economically disadvantaged individuals referred by the System for employment; provided however, if the employer utilizes nondiscriminatory screening criteria, the employer shall have the sole discretion to interview and/or hire individuals referred or certified by the San Francisco Workforce Development System as being qualified economically disadvantaged individuals. The duration of the first source interviewing requirement shall be *determined by the FSHA and shall be* set forth in each agreement~~, but shall not exceed 10 days~~. During that period, the employer may publicize the entry level positions in accordance with the agreement. A need for urgent or temporary hires must be evaluated, and appropriate provisions for such a situation must be made in the agreement.

(3) Set appropriate requirements for providing notification of available entry level positions to the San Francisco Workforce Development System so that the System may train and refer an adequate pool of qualified economically disadvantaged individuals to participating employers. Notification should include such information as employment needs by occupational title, skills, and/or experience required, the hours required, wage scale and duration of employment, identification of entry level and training positions, identification of English language proficiency requirements, or absence thereof, and the projected schedule and procedures for hiring for each occupation. Employers should provide both long term job need projections and notice before initiating the interviewing and hiring process. These notification requirements will take into consideration any need to protect the employer's proprietary information.

(4) Set appropriate record keeping and monitoring requirements. The First Source Hiring Administration shall develop easy-to-use forms and record keeping

requirements for documenting compliance with the agreement. To the greatest extent possible, these requirements shall utilize the employer's existing record-keeping systems, be non-duplicative, and facilitate a coordinated flow of information and referrals.

(5) Establish guidelines for employer good faith efforts to comply with the first source hiring requirements of this Chapter. The FSHA will work with City departments to develop employer good faith effort requirements appropriate to the types of contracts and property contracts handled by each department. Employers shall appoint a liaison for dealing with the development and implementation of the employer's agreement. In the event that the FSHA finds that the employer has taken actions primarily for the purpose of circumventing the requirements of this Chapter, that employer shall be subject to the sanctions set forth in Section 83.10 of this Chapter.

(6) Set the term of the requirements.

(7) Set appropriate enforcement and sanctioning standards consistent with this Chapter.

(8) Set forth the City's obligations to develop training programs, job applicant referrals, technical assistance, and information systems that assist the employer in complying with this Chapter.

(9) Require developer to include notice of the requirements of this Chapter in leases, subleases, and other occupancy contracts.

(c) The employer shall make the final determination of whether an economically disadvantaged individual referred by the System is "qualified" for the position. Any qualified economically disadvantaged individual who is hired by the employer shall have the same rights and obligations as all other employees in similar positions. The employer shall not discriminate against any employees on the basis of participation in the First Source Hiring

Program. Any such discrimination shall be considered a breach of the employer's "good faith" obligations under the agreement, and shall be subject to the sanctions set forth in Section 83.10 of this Chapter.

(d) Compliance by an employer with a City department's approved plan shall be deemed to be compliance with the requirements of this Chapter.

(e) In any situation where the FSHA concludes based upon application by the employer that compliance with this Chapter would cause economic hardship the FSHA may grant an exception to any or all of the requirements of this Chapter. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.10. VIOLATION OF FIRST SOURCE HIRING IN CONTRACTS AND PROPERTY CONTRACTS.

(a) Violation of the requirements of this Chapter is subject to an assessment of liquidated damages as set forth below. Additionally, contractors, except property contractors, may be subject to the provisions of Sections 6.52, 6.58, and/or 6.60 of the San Francisco Administrative Code.

(b) If upon administrative review as provided for in Subsection (e) of this Section, the FSHA determines that entry level positions were not made available to the System for referral of qualified economically disadvantaged individuals as specified in the employer's first source hiring agreement, and the employer does not remedy the violations, that employer shall be assessed liquidated damages in the amount of $2,070 for every new hire for an entry level position improperly withheld from the first source hiring process.

(c) Lack of referrals of qualified economically disadvantaged individuals, delay in referrals due to causes beyond the reasonable control of the employer, emergency, or other good cause as demonstrated by the employer to the FSHA may be a defense to the assessment of liquidated damages under this Chapter.

(d) If the developer fulfills its obligations as set forth in this Chapter, the developer shall not be held responsible for the failure of an employer to comply with the requirements of this Chapter.

(e) The assessment of liquidated damages and the evaluation of any defenses or mitigating factors, shall be made by the FSHA.

(f) The FSHA shall establish procedures that allow an employer to respond to any complaints of noncompliance made by a City department or other interested party, or any determination of noncompliance with this Chapter made by the FSHA, prior to the imposition of any sanctions by the City. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.11. FIRST SOURCE HIRING REQUIREMENTS FOR PERMITS FOR COMMERCIAL DEVELOPMENT *AND RESIDENTIAL PROJECTS*.

(a) Developers applying for permits as defined in Section 83.4(m) *and Section 83.4(s)* shall cooperate with the FSHA in establishing first source hiring agreement(s) for the development project. *The Planning Commission shall not approve a development project, nor shall any City department issue a permit subject to this Chapter unless the developer or contractor has obtained approval from the FSHA of a first source hiring agreement applicable to the development project or obtained an exemption from the requirements of Chapter 83 pursuant to Section 83.11(d). The FSHA may condition approval of the first source hiring agreement on the City's approval of the development project. In the event the development project approved by the Planning Commission differs substantially from the development project assumed by the FSHA at the time it approved the agreement, the FSHA may approve modifications to the first source hiring agreement if necessary for* *the agreement to conform to the requirements of this Chapter.* Such agreement shall become a condition of the permit, and shall:

(1) Set appropriate hiring and retention goals for entry level positions for all employers engaged in construction work on, and commercial activity(ies) to be conducted in, the development project*, including residential services*. The developer shall agree to require all such employers to achieve these hiring and retention goals, or, if unable to achieve these goals, to establish good faith efforts as to their attempts to do so, as set forth in the agreement. The agreement shall take into consideration the employer's participation in existing job training, referral and/or brokerage programs. Within the discretion of the FSHA, subject to appropriate modifications, participation in such programs may be certified as meeting the requirements of this Chapter. Failure either to achieve the specified goal, or to establish good faith efforts will constitute noncompliance and will subject the employer to the sanctions provided in Section 83.12 of this Chapter.

(2) Set first source interviewing, recruitment and hiring requirements for all employers engaged in construction work on, and commercial activity(ies) to be conducted in, the development project, *including residential services,* which will provide the San Francisco Workforce Development System with the first opportunity to provide qualified economically disadvantaged individuals for consideration for employment for entry level positions. Employers subject to the agreement shall consider all applications of qualified economically disadvantaged individuals referred by the System for employment; provided however, if the employer utilizes nondiscriminatory screening criteria, the employer shall have the sole discretion to interview and/or hire individuals referred or certified by the San Francisco Workforce Development System as being qualified economically disadvantaged individuals. The duration of the first source interviewing requirement shall be *determined by the FSHA and*

shall be set forth in each agreement ~~*but shall not exceed 10 days*~~. During that period, the employer subject to the agreement may publicize the positions in accordance with the agreement. A need for urgent or temporary hires must be evaluated, and appropriate provisions for such a situation must be made in the agreement.

(3) Set appropriate requirements for providing notification of available entry level positions to the San Francisco Workforce Development System so that the System may train and refer an adequate pool of qualified economically disadvantaged individuals to employers subject to the agreement. Notification should include such information as employment needs by occupational title, skills, and/or experience required, the hours required, wage scale and duration of employment, identification of entry level and training positions, identification of English language proficiency requirements, or absence thereof, and the projected schedule and procedures for hiring for each occupation. Employers subject to the agreement should provide both long-term job need projections, and notice before initiating the interviewing and hiring process. These notification requirements will take into consideration any need to protect the employer's proprietary information.

(4) Set appropriate record keeping and monitoring requirements. The First Source Hiring Administration shall develop easy to use forms and record keeping requirements for documenting compliance with the agreement. To the greatest extent possible, these requirements shall utilize the employer's existing record keeping systems, be non-duplicative, and facilitate a coordinated flow of information and referrals.

(5) Establish guidelines for employer good faith efforts to comply with the first source hiring requirements of this Chapter. The FSHA will work with City departments to develop employer good faith effort requirements appropriate to the types of permits handled by each department. Employers shall appoint a liaison for dealing with the development and

implementation of the employer's agreement. In the event that the FSHA finds that the employer has taken actions primarily for purpose of circumventing the requirements of this Chapter, that employer shall be subject to the sanctions set forth in Section 83.12 of this Chapter.

(6) Set the term of the requirements.

(7) Set appropriate enforcement and sanctioning standards consistent with this Chapter.

(8) Provide that the agreement shall be recorded.

(9) Set forth the City's obligations to develop training programs, job applicant referrals, technical assistance, and information systems that assist the employer in complying with this Chapter.

(10) Require developer to include notice of the requirements of this Chapter in leases, subleases, and other occupancy contracts.

(b) The employer subject to the agreement shall make the final determination of whether an economically disadvantaged individual referred by the System is "qualified" for the position. Any qualified economically disadvantaged individual who is hired by the employer shall have the same rights and obligations as all other employees in similar positions. The employer shall not discriminate against any employees on the basis of participation in the First Source Hiring Program. Any such discrimination shall be considered a breach of the employer's "good faith" obligations under the agreement, and shall be subject to the sanctions set forth in Section 83.12 of this Chapter.

(c) Compliance by an employer subject to the agreement with a City department's approved plan shall be deemed to be compliance with the requirements of this Chapter. In situations where an employer must comply with the requirements of this Chapter as part of a contract or property contract, and subsequently must apply for permits for the same project that is the subject of the contract or property contract, the employer will be deemed to be in compliance with this Chapter.

(d) In any situation where the FSHA concludes based upon application by the employer that compliance with this Chapter would cause economic hardship or the burden of compliance would be disproportionate to the impacts of the employer's commercial activity(ies) in the City, the FSHA shall grant an exception to any or all of the requirements of this Chapter. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.12. VIOLATION OF FIRST SOURCE HIRING IN PERMITS.

(a) The sole financial remedy for violation of the requirements of this Chapter is the penalty set forth below. Additionally, failure to comply with the conditions imposed on the permit may be subject to the provisions of San Francisco Building Code Section 104.2.

(b) If upon administrative review, as provided for in Subsection (e) of this Section, the FSHA determines that entry level positions were not made available to the System for referral of qualified economically disadvantaged individuals as specified in the employer's first source hiring agreement, and the employer does not remedy the violations, that employer shall be assessed a penalty in the amount of $2,070 for every new hire for an entry level position improperly withheld from the first source hiring process.

(c) Lack of referrals of qualified economically disadvantaged individuals, delay in referrals due to causes beyond the reasonable control of the employer, emergency, or other good cause as demonstrated by the employer to the FSHA may be a defense to the assessment of a penalty under this Chapter.

(d) If the developer fulfills its obligations as set forth in this Chapter, the developer shall not be held responsible for the failure of an employer to comply with the requirements of this Chapter.

(e) The assessment of a penalty and the evaluation of any defenses and mitigating factors, shall be made by the FSHA.

(f) The FSHA shall establish procedures that allow an employer to respond to any complaints of noncompliance made by a City department or other interested party, or any determination of noncompliance with this Chapter made by the FSHA, prior to the imposition of any sanctions by the City. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.12A. FEE SCHEDULE.

(a) A developer, contractor, or employer entering into a first source hiring agreement for commercial activities that include from 25,000 square feet to 99,999 square feet shall pay a fee of $150.00 to defray the costs of administering the program. A developer, contractor, or employer entering into a first source hiring agreement for commercial activities that include 100,000 square feet or more shall pay a fee of $250.00.

(b) A developer, contractor, or employer entering into a first source hiring agreement for a residential project that includes 10 to 49 units shall pay a fee of $150.00 to defray the costs of administering the program. A developer, contractor, or employer entering into a first source hiring agreement for a residential project that includes 50 or more units shall pay a fee of $250.00.

(c) All fees under this Section shall be due and payable within 30 days of the date of the issuance of a notice of payment due. Delinquent fees shall be subject to a penalty of ten percent (10%)

plus interest at the rate of one percent (1%) per month on the outstanding balance which shall be added to the amount of the fee collected from the date that payment is due.

(d) Non-profit entities shall be exempt from the administrative fee requirements under this Section.

SEC. 83.13. RECORDS.

The employers subject to provisions of this Chapter shall maintain and provide the FSHA with the records necessary to document compliance with the requirements of this Chapter as determined in the first source agreement. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.14. GENERAL EXCLUSIONS AND LIMITATIONS.

Nothing in this Chapter shall be interpreted to interfere with, or prohibit existing labor agreements, nondiscrimination programs, workforce training pro-grams and agreements, economically disadvantaged hiring and retention goals. This Chapter is to be implemented *in* a manner that does not conflict with applicable federal or State laws.

Nothing in this Chapter shall be interpreted in a manner that would displace an employer's existing workers.

The FSHA may reach agreements with other governmental agencies that have similar programs in order to ensure that requirements imposed pursuant to this Chapter and by other governmental agency authority do not create an undue burden or conflicting obligations on employers, and to make the implementation of the purpose of this Chapter feasible where the City and other jurisdictions have joined together to procure goods, services or public works. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.15. COLLECTIVE BARGAINING AGREEMENTS.

Notwithstanding anything to the contrary in this Chapter, if a first source hiring agreement conflicts with an existing collective bargaining agreement to which an employer is a party, the collective bargaining agreement shall prevail. However, the employer will be obligated to provide workforce needs information to the San Francisco Workforce Development System and the employer will be obligated to make good faith efforts to comply with the requirements of its first source hiring agreement that do not conflict with the collective bargaining agreement. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.16. SEVERABILITY.

If any part or provision of this Chapter, or the application thereof to any person or circumstance, is held invalid, the remainder of this Chapter, including the application of such part or provision to other persons or circumstances, shall not be affected thereby and shall continue in full force and effect. To this end, the provisions of this Chapter are severable. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.17. LIMITED TO PROMOTION OF GENERAL WELFARE.

In undertaking the adoption and enforcement of this Chapter, the City and County of San Francisco is assuming an undertaking only to promote the general welfare. It is not assuming, nor is it imposing on its commissions, departments, officers and employees, an obligation for breach of which it is liable in money damages to any person who claims that such breach proximately caused injury. (Added by Ord. 264-98, App. 8/21/98)

SEC. 83.18. OPERATIVE DATE AND APPLICATION.

Phase I, as defined in 83.4(n)*,* ~~*shall*~~ bec~~*o*~~*a*me operative ~~*30 days after the date the ordinance adopting this Chapter becomes effective,*~~ *on October 20, 1998.* Phase II, as defined in Section 83.4(o) of this Chapter*,* ~~*will*~~ bec~~*o*~~*a*me operative *on April 1, 2001,* 24 (twenty-four) months after *the FSHA* adopt~~*ioned*~~*ed* ~~*of*~~ a resolution ~~*by the FSHA*~~*stating* that Phase I ha~~*s*~~*d* been implemented. This Chapter is intended to have prospective effect only, and shall not be interpreted to impair any rights under any existing City contract or property contract or permit. The provisions of this Chapter shall expire ~~*six years after the effective date of this ordinance*~~ *on January 1, 2009*. (Added by Ord. 264-98, App. 8/21/98)

APPROVED AS TO FORM:

APPROVED AS TO FORM:
DENNIS J. HERRERA, City Attorney

By: ________________________
JENNIFER WILLIAMS
Deputy City Attorney

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REPORT: EPSR                                 PRIVATE INDUSTRY COUNCIL OF SAN FRANCISCO, INC.                                   Page:  87
08/10/2004  14:51:19                                    PARTICIPANT STATUS ROSTER
                                                          GRANT: 201 WIA ADULT
                                               FOR THE PERIOD:  07/01/2003 TO 07/31/2004
AGENCY:  154C SF VOCATIONAL SERVICES
                                  APPL      CASE     ELIG                     -- ACTIVITY --      EST/ACTUL   CMPL                              HOURLY  HOURS   TRNG
SEQ.  PARTICIPANT NAME           NUMBER    NUMBER    CODE   AGE  BEGIN DATE   CODE & DESCIPT      ENDING DTE  CODE  EXIT.DATE    EXITCODE   WAGE    WORKED  RELTD
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  1   CARRION, MARVIN J.         1004702    6004278  AB      45    05/10/2004   13  JOB SRCH          09/24/2004
                                                                 05/10/2004   32  EMPL PLAN       05/10/2004    1
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      PROGRAM CODE: 52040612380000                                 JOB CODE & TITLE:
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  7   WRIGHT JR., DONALD E       1003134    6003031  B       42    07/01/2003   13  JOB SRCH          10/29/2003     2   10/29/2003  07
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First in Line: An Evaluation of San Francisco's First Source Hiring Program

August 2004

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We also wish to thank more than 50 individuals—representing program founders, workforce development practitioners, employers, City department staff, and job seekers—who shared their opinions, experiences and suggestions about the program. They were generous with their time and extremely thoughtful with their reflections.

We owe many thanks to the individuals who helped us access administrative records, documents and other data needed to conduct the evaluation. Those individuals include: Terri Austin, Department of Human Services; Zelda Saeli, Private Industry Council of San Francisco; and Don Hesse, Camille Hooker, Tony Lugo, Sylvia Tiongson, all with Department of Human Services.

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Executive Summary

The decision by San Francisco's Board of Supervisors in 1998 to adopt the first source hiring ordinance signaled a new level of commitment on the part of the City to improve access to jobs for low income individuals. The ordinance requires projects funded with public dollars and/or requiring building permit applications above established thresholds to give first consideration for entry level jobs to economically disadvantaged individuals. The ordinance included a 5-year sunset provision. The Board of Supervisors granted a one-year extension to allow time for an evaluation of the ordinance and the First Source Hiring Program (FSHP). The City and County of San Francisco engaged San Francisco Urban Institute (SFUI) in March 2004 to assess the effectiveness of FSHP in relation to its legislated mandate. The evaluation was conducted from March 1 through July 2004 and reflects program implementation from January 1999 through May 15, 2004. What follows is a summary of the recommendations and findings.

RECOMMENDATIONS

POLICY:

1. Reauthorize the First Source Hiring Ordinance within the context of the City adopting a "systems change" initiative to strengthen its workforce development system. As part of this initiative, establish a multi-sector Task Force similar to the welfare reform task force established in 1996.

   Rationale: *The First Source hiring ordinance reflects a worthy concept that we believe has yet to be fully tested. The First Source Hiring Program (FSHP) achieved only marginal results during the past five years; however, the first source hiring concept continues to garner strong support from most stakeholders. They view the ordinance as an important tool for ensuring employment access for low income individuals. The implementation problems FSHP has experienced suggest that improved outcomes will only be possible to the extent that the City addresses structural and operational weaknesses within the City's workforce development system. Such an undertaking will require political will and a commitment to broad, multi-sector leadership and follow-through.*

2. Amend the first source hiring ordinance to reflect current conditions and lessons learned. Suggested legislative modifications include:

(a) Transferring program oversight of the ordinance/program to a citywide workforce development governing body such as the Workforce Investment Board;

(b) Eliminating the role of the Workforce Development Advisory Committee from the legislation but drawing on the expertise of this group, and beyond, to form a multi-sector Workforce Development Task Force, one task of which would be to position the first source hiring program within a reformed workforce development system; and

(c) Expanding employer options for meeting first source hiring obligations to include, for example: the provision of a designated number of annual on-the-job training opportunities and/or summer jobs for youth; the option to designate a fixed annual number of entry level employment slots for First Source job applicants; and the ability to contribute a one-time designated sum of dollars to the Workforce Development Fund for the option of "opting out" of first source hiring requirements.

Rationale: (a) The FSHA was created prior to the formation of the Workforce Investment Board. The oversight function and authority for the program should be updated to reflect the changes resulting from the Workforce Investment Act. The first source hiring ordinance/program should be overseen by a governing body that has broad authority for the City's workforce development planning and funding functions.

(b) The expertise of the WDAC would be better used if applied more broadly to the purpose of helping to improve the City's entire workforce development system.

(c) The City is apt to develop stronger and longer lasting relationships with employers if employers' hiring obligations can be met through a broader range of hiring options.

3. Establish a Workforce Development Fund to replace the existing First Source Fund. Transfer responsibility for allocation of these funds to the Workforce Investment Board. Develop transparent policy guidelines for the solicitation and allocation of these funds. Consider using the Fund to fill "funding gaps" in the City's workforce development system.

Rationale: Given the restricted nature of most federal and state funding for workforce development programs, it is in the City's best interest to use its unrestricted dollars to support activities that cannot be supported through normal funding streams. The governing body established by WIA to coordinate local planning and funding of workforce development programs is the WIB, therefore, we believe it is the appropriate body to manage and allocate the funds currently managed by the FSHA.

4. Establish a financial incentive, such as a payroll tax reduction, for employers who hire from the pool of first source job seekers, whether those employers have first source hiring agreements in place or not. Additionally, investigate which existing financial incentives could require participation in first source as a condition of receipt of the financial benefit.

   Rationale: First Source needs to give businesses something to create an "alignment of interests." Because FS imposes simply a good faith effort requirement on employers, it is not easily enforceable. The data we have reviewed suggest that the carrot holds more promise than the stick.

5. Relocate First source policy activities to the Mayor's Office of Economic Development.

   Rationale: Implementation of First Source, as intended, will require employers to provide forecasting data that will be useful to the Mayor's Office of Economic Development for citywide planning. In addition, it is the MOED that will oversee business incentives. It makes sense to have First Source oversight and policy located within that department.

PROGRAMMATIC:

6. Integrate first source activities thoroughly into the workforce development system.

   Rationale: First source should be one of many ways to get jobs into the public system. Job seekers should not be able to distinguish first source staff or jobs from any other staff or jobs within the workforce development system.

7. The First Source Hiring Program should adopt a business service model rather than relying on a punitive model based on enforcement of agreements.

   Rationale: Enforcement of first source hiring agreements has been operationally unrealistic due to a shortage of staff and an absence of data related to contractors subject to first source hiring requirements. Additionally, San Francisco is more apt to be perceived as an attractive business locale if it is recognized as offering employers benefits rather than recognized as a difficult city in which to do business.

8. Develop adequate information and operational systems to ensure that key legislative requirements within the ordinance are consistently adhered to during program implementation. This includes: (1) ensuring that First Source hiring agreements are signed *prior* to approval of leases, contracts and permits; and (2) requiring that employers subject to first source hiring requirements provide forecasting data on a regular schedule.

Rationale: FSHP currently has no systematic method of working with City departments to acquire ongoing data about contractors subject to first source hiring requirements. The program has not been able to track and report on the number of employers subject to first source hiring requirements nor has it been able to document how many of these employers have complied by entering into first source hiring agreements. Developing information and operational systems to track these numbers should be one of the program's first and highest priorities.

9. Assess the ramifications of pursuing first source hiring agreements from residential developers.

   Rationale: To date, FSHP has not pursued first source hiring agreements with developers of housing developments. Given the scope of job opportunities that could emanate from the housing bond, FSHP should assess the potential of capturing construction and permanent jobs through this venue.

10. Develop a performance-based implementation plan, to include identification of realistic and measurable annual performance targets tied to the legislative mandate. Report to governing body and community stakeholders on performance outcomes at regular, established intervals.

    Rationale: Many of the difficulties FSHP has experienced, we believe, are due to the absence of a strategic or implementation plan. Development of such a plan will give staff a "roadmap" to guide their activities and ensure proper programmatic direction. This would also help staff to have greater clarity about annual performance expectations. Staff should be able to report back to stakeholders about agreed-upon performance targets.

FINDINGS

THE FIRST SOURCE HIRING CONCEPT

1. The majority of stakeholders said they believe the first source hiring ordinance is a valuable tool for trying to ensure that low income individuals gain access to jobs.

   - *Various stakeholders, particularly those representing low income communities, said they think first source hiring agreements fill a necessary role similar to that previously filled by affirmative action programs.*

   - *Most employers agreed in principle with the first source hiring concept, but said they thought certain policies and practices related to its implementation should be modified.*

PROGRAM OUTCOMES

Stakeholder Satisfaction

2. Although most stakeholders were supportive of the first source concept, many voiced concern that First Source implementation had strayed from the original vision.

   - *Many stakeholders said they thought the ordinance had been developed as a mechanism to capture jobs resulting from private development projects, but said the focus has been primarily on public works projects, which are already connected to employment compliance programs.*

   - *Related to implementation, stakeholder concerns centered on: confusion regarding the scope/application of the ordinance and program mechanics; inadequacy of the job forecasting and job referral systems; inability of the program to monitor and enforce first source hiring agreements; and the inordinate attention spent on FS Fund funded projects at the expense of building FS capacity.*

   - *Related to outcomes, most stakeholders said they thought FSHP reflected a lot of unfulfilled potential. Jobs that could have been captured, they said, had not been tapped.*

Involvement of City Departments

3. Insufficient "buy-in" from City departments has weakened implementation of the first source hiring ordinance. The program was designed to rely on a steady flow of information from City departments about contractors subject to first source hiring requirements. Through the end of 2003, only a small percentage of City departments had complied with the requirements mandated by the First Source Hiring ordinance.

   - *Only seven of more than 50 City departments submitted Implementation and Monitoring Plans to FSHP, as required by the legislation.*

Involvement of Referral Agencies

4. During program start-up, FSHP succeeded in ensuring a high level of involvement from referring agencies in the creation of the initial referral system for first source jobs.

   - *A subcommittee of the Workforce Development Advisory Committee devoted substantial time to creating a system for job posting and referrals. Six agencies made commitments to abide by designated protocols to ensure standards of quality control.*

5. The construction and permanent job referral systems that were set up never entirely coalesced to create an enduring and effective first source job referral system.

- *After 1999, First Source had a difficult time fully engaging agencies in the referral system for permanent jobs. Administrative records suggest that from January 1999 through December 2003, only 20 agencies (34% of agencies receiving job posting notices) responded with referrals.*
- *The goal of involving a broad network of agencies as referral sources for construction jobs has not been met. Stakeholders we interviewed— representing both lead and referral agencies involved in the Mission Bay and Third Street Light Rail construction job placement programs—said the systems that were set up have not worked as intended.*

6. Recent efforts by DHS' workforce division to re-invigorate the system for referring FS job seekers for permanent jobs are showing positive results.

- *In less than five months, 197 job seekers were processed through the new system; 50 job seekers were referred to jobs; and 21 job seekers were offered jobs.*
- *Most stakeholders representing referring agencies have been enthusiastic about the new system. Between January and May 15, 2004, 19 distinct agencies had referred their clients for services through the new system. Job seekers gave the new system high praise.*

Quality of the Job Applicant Pool

7. An important aspect of creating a reliable, robust job referral system is the assurance that staff will be able to draw on a pool of qualified job seekers to meet labor market demand. It does not appear that FSHP has been able to achieve this objective.

- *The number of job seekers referred for permanent jobs declined from a high of 226 in 1999 to 25 in 2002. We could find no records of referrals for 2003.*
- *Employers we interviewed more often than not voiced dissatisfaction with the level of preparedness of the job seekers sent to them for jobs.*

Employer Engagement

8. The data available was not sufficient to ascertain how many employers contracting with the city are subject to first source hiring requirements or what percent of these have first source hiring agreements in place.

- *FSHP has not developed adequate systems to identify which contractors are subject to first source hiring requirements.*
- *FSHP does not have standard protocols for developing first source hiring agreements. Through departments issuing service contracts, for example, agreements appear to be mostly "boiler plate," with some employers indicating they were not really even aware of their obligations. First source hiring agreements associated with commercial*

development, on the other hand, were developed with much greater specificity and reflected greater understanding by employers of their obligations.

9. From program start-up through December 2003, 76 employers posted notices with FSHP for permanent jobs.

   - *The highest number of employers posting notices with FSHP for permanent jobs peaked at 31 in 2001, but declined thereafter.*

10. Although financial benefits to employers are mentioned in the First Source hiring ordinance, those financial benefits are not explicitly linked to First Source.

    - *Currently, employers signing first source hiring agreements are not receiving any "special" financial incentive for their compliance with the first source hiring ordinance. What are available to them are the hiring tax credits available to FS and non-FS employers alike.*
    - *Employers benefiting from the City's financial/business incentives, e.g. empowerment zone credits, should also be required to participate in First Source.*

Access to Jobs for Economically Disadvantaged Individuals

11. Most of the job placement activity reported as attributable to First Source has been in the area of construction. The number of individuals hired into permanent jobs has been difficult to determine throughout the past five years due to inadequate information management systems.

    - *Administrative records suggest that 32 individuals were hired into permanent jobs through the formal job referral system between January 1999 and December 2003. Data provided through our interviews with stakeholders, however, suggest that perhaps as many as 157 additional individuals may also have been hired for permanent jobs. This would result in a total of 189 individuals placed in FS permanent jobs, although we can make no assurances as to the reliability of these numbers.*
    - *According to PIC records, 474 individuals were hired into construction jobs between July 1, 2001 and March 30, 2004.*
    - *For the first five months of 2004, 21 individuals were hired through the new system of job posting operating through the One Stop System.*

FACTORS AFFECTING PROGRAM PERFORMANCE

12. The common perception among stakeholders was that FSHP has not had sufficient resources to fully carry out its legislated mandate. In our opinion, a more critical problem has been inadequate oversight and direction at the policy level.

- *In our assessment, FSHA lost sight of the higher-level goals of the first source hiring ordinance once it took on the task of managing the First Source Fund. The end result is that program performance has suffered from a lack of proper oversight and direction.*

13. The general consensus among stakeholders (except job seekers) was that FSHP has suffered from a lack of leadership, structure and accountability systems.

- *Many stakeholders said they thought the program had not received the level of political support it needed to be effectively implemented.*
- *Many stakeholders said they thought FSHP would have a difficult time improving unless the City resolved to "reform" the broader workforce development system.*

I. Introduction

Responding to a confluence of economic, political and social factors, the City and County of San Francisco adopted a first source hiring ordinance in August 1998. The ordinance requires employers with City-funded contracts, leases and permits at designated thresholds to offer economically disadvantaged individuals the first opportunity to be considered for entry level jobs. At the time the ordinance was crafted, the San Francisco economy was booming. Major public works and private development projects were underway or in the planning stages. At the same time, because of welfare reform legislation passed in 1996, the City was under new pressure to help more than 7,000 welfare recipients make the transition to employment. The ordinance was seen as a mechanism to help open doors to employment for populations who had historically had a difficult time gaining access to jobs.

> ***"...the ordinance was viewed as a mechanism to leverage the clout of the City and improve the ties and the effectiveness of our whole workforce development training apparatus."***
>
> \- Key Informant

The ordinance included a 5-year sunset provision. The Board of Supervisors extended the ordinance for one year to allow time to assess the effectiveness of the ordinance. The First Source Hiring Administration (FSHA), the governing body for the program, engaged San Francisco Urban Institute (SFUI) in March 2004 to evaluate the program. The evaluation was conducted during a 5-month period extending March 1 through July 31, 2004.

Data Collection Methods and Sources

The evaluation team relied on multiple data collection and analytical methods, including interviews with key informants, focus groups, document review, and review of automated and hard copy data files (See Appendix A for a description of data collection methods and sources). While we have made every effort to obtain the most reliable data, we caution in saying that we do not think the quantitative data associated with the permanent jobs referral and placement activities are entirely reliable. The data systems that were in place through 2003 to track that activity have been seriously weak.

Guiding Questions

The following questions guided the evaluation team's inquiry.

a) How effective was FSHP in meeting its intended outcome objectives?
b) What internal and external factors affected the program's ability to achieve its intended outcomes?
c) What policy and programmatic changes could be instituted to improve program performance?

Organization of the Report

Section I of the report provides an overview of employment linkage programs and describes the concept imbedded in first source hiring agreements; it provides background on the origins and context of the San Francisco first source initiative; and it describes the legislative mandate and places this within the broader context of first source hiring programs operating in other jurisdictions. Section II describes the key components of the San Francisco FSHP model. Section III presents our findings of the effectiveness of FSHP in relation to its intended outcomes. The section also reflects on internal and external factors that have affected program performance. Section IV presents our conclusions as well as policy and programmatic recommendations.

A. Background

Many workforce development policymakers and practitioners grapple with the difficult task of serving a dual customer base as they seek to meet the demands of their local labor market (Melendez and Harrison 1998). Industry requirements may not match the educational background and skill sets of the available pool of job seekers. Getting the labor force prepared to meet the requisite skills levels of industry may take considerable time. And when the goal of assisting the hardest to employ is added to the equation, the "difficulty factor" becomes exponential.

To offset the odds, policy makers throughout the country have adopted numerous policies and strategies aimed at creating greater access to jobs for disadvantaged populations. Some of these public policies include: a) the adoption of hiring agreements, including first source hiring agreements, local hiring agreements, and minority hiring agreements; b) the creation of neighborhood hiring centers; and c) enforcement of HUD Section 3 preferences (Okagaki 1995).

The general concept underlying hiring agreements, normally implemented through local ordinances, is that developers and employers who receive public subsidies and contracts— tax abatements, public bonds, grants, tax credits— have a responsibility to give back to the community that provided the public support. First Source hiring agreements require these employers to give priority consideration to a specific pool of job seekers *prior* to opening up the applicant pool to other populations. The literature (Molina 1998; Emsellem, Sherry et al. 2000) suggests that for first source hiring programs to be effective, they must have:

a) the ability to access *both* employers and job seekers;
b) the means to ensure that job seekers who are referred are qualified; and
c) the capacity to process job requests quickly.

An ordinance that also includes a resident hiring goal as part of its first source hiring program is suggested as being the most effective (Emsellem, Sherry et al. 2000).

The first municipality to pass a first source hiring ordinance was Portland, Oregon in 1978. Other municipalities following suit include cities such as Boston, Minneapolis, Berkeley, Oakland, and East Palo Alto. The literature about the effectiveness of this type of program suggests that first source hiring legislation can play an important role in ensuring access to jobs for hard to employ populations, but success is often tied to the quality of implementation (Okagaki 1995).

> ***"The City, the business community, the service providers, organized labor, the schools, and the people who must personally meet the challenge of welfare reform are gathering at a unique historical moment."***
>
> - Sec. 83.2. (h)
> SF First Source Hiring
> Ordinance.

1. Origins and Context of First Source in San Francisco

— *What spurred the founders to craft the first source hiring ordinance and program?*

In 1997, San Francisco City department directors, community activists, and workforce development practitioners came together to try to develop legislation that they hoped would result in greater access to jobs for low income people. The conditions seemed right. The economy was booming. Major economic development projects were underway. Why not use the economic and political clout of the City to help meet the challenges imposed by welfare reform?

It is remembered by key informants as an exciting time, marked by optimism and creative leadership. As program founders ultimately wrote in the first source hiring ordinance, "The City, the business community, the service providers, organized labor, the schools, and the people who must personally meet the challenge of welfare reform are gathering at a unique historical moment." (City and County of San Francisco 1998) It was an unusual moment in time when economic bounty, social urgency and political cohesion converged.

A Percolating Idea

The idea of creating something akin to a first source hiring ordinance had been percolating independently within distinct City and community circles in various forms even before the passage of welfare reform in 1996. At a grassroots level, beginning at least as early as 1995, a "Section 3 Work Group," made up of community leaders and activists concerned with job access for low income people, had been meeting to investigate how the HUD Section 3 Program might be applied locally. The Working Group thought the HUD Section 3 program had tremendous potential but lacked enforcement and implementation procedures. As one of those individuals described, "We could see Proposition 209 coming, so we needed to develop some alternatives to traditional affirmative action programs, and we saw welfare reform coming as well."

At the City level, department directors and program administrators were grappling with the new mandates imposed by the passage of welfare reform legislation in 1996. As one administrator remembered, "One of the great fears in San Francisco was that there was such a natural disconnect between the jobs that were then being created and the skills, education and background levels of the folks we had in the TANF system." Recommendations coming out of the Welfare Reform Task Force, convened by former Mayor Brown in 1996, prompted the City to consider how it might leverage its economic development activity to ensure employment access for more than 7,000 welfare recipients newly pressured by the 5-year time limit.

> ***"We did not want be in a situation where these [first source] jobs were going to go to the people who were going to get them anyway; we wanted to drive it to that next level down."***
>
> — Key Informant

Benefits of Economic Boom for Most in Need

With a booming economy and a mayor who had a penchant for promoting economic development deals, San Francisco in the late 1990s was a city teeming with massive new public works and private development projects. As one of the program founders recalled, the question that kept rising in people's minds, was: "How do we channel the benefits of that boom towards folks from low income communities—where the City had a stake, a permit or approval process—how could we tie our need to expand work opportunities for low income folks to this economic boom that was happening?"

For many of the first source hiring organizers, the desire to use the City's leverage to create jobs for economically disadvantaged individuals was rooted in the knowledge that, during the past 50 years, most unemployed individuals in San Francisco's poorest communities had been bypassed by the City's previous economic booms. San Francisco neighborhoods—Visitation Valley, Bayview Hunter's Point, Potrero Hill, the Mission

District, the Western Addition—all had high levels of unemployment and underemployment in the late 1990s despite the City's robust economy. "What we did not want was to be in a situation where these [first source] jobs were going to go to the people who were going to get them anyway," said one of the crafters of the legislation. "We wanted to drive it to that next level down."

Union Opposition

The prospect of a first source hiring ordinance did not sit well with San Francisco's community of organized labor. As one key informant recalled, "Union representatives filibustered nearly every meeting. The union representative was just ridiculous. He just refused to try to understand the ordinance. He kept arguing with me about it, saying, 'the City can't do this, the City can't do that.' I explained to him that he was misinterpreting the ordinance and it wasn't out to challenge the unions."

At the time, according to one key informant, the trade unions needed labor as badly as any other industry. Labor was being brought in from all over the country to try to keep up for the demand generated by the City's construction projects. First source hiring organizers could not understand why the proposed ordinance was meeting with so much resistance from labor.

Although organized labor could not block the passage of the first source hiring ordinance, many stakeholders said they thought pressure from the unions had in fact resulted in a weakening of the legislation that was ultimately enacted.

B. *The Legislative Mandate*

— How could the law be used to leverage jobs?

Though many groups came together to push for passage of the first source hiring ordinance, getting agreement on the *specific* terms to be included in the legislation did not come easily, if at all. As one program founder recalled, "There were advocates who wanted to see a lot of enforcement. From the City's side, it was more of 'the only way we're going to get this to work is if we convince employers to cooperate and we're providing them with a service.'" In the end, the tension between those who leaned toward a business services model and those who leaned toward an affirmative action, enforcement model was never entirely reconciled.

1. Key Features of the First Source Hiring Ordinance

The ordinance, as adopted in August 1998, applies to projects funded with public dollars and/or to those requiring public authority. The legislation stipulated that the ordinance would be implemented in two phases, as shown in Table 1 on the following page.

Table 1. Implementation of First Source Hiring Ordinance, by Phase

Public leverage	Type of Job	Phase 1 Sept. 1998-March 2002	Phase 2 April 2002-Present
Construction contracts and subcontracts	Entry-level construction	Construction contracts $350,000 or more	Construction contracts $350,000 or more
Leases	Permanent jobs	Leases of City property	Leases of City property
Grants	Permanent jobs	Grants/loans over $200,000 issued by MOH or MOCD	Grants and loans over $200,000 made by any City department
Permits	Permanent and entry-level construction jobs	Permits for commercial projects 50,000 sq. ft. +	Permits for commercial projects 25,000 sq. ft. +
Services	Permanent jobs	Not in effect	City contracts for services $200,000 or more
Procurement Contracts	Permanent jobs	Not in effect	Contracts for the procurement of goods, materials, equipment or supplies

Source: Program document entitled "Draft Report on Phase One of the FSHP" (Hesse 2002).

Target Population

Crafters of the ordinance believed first source jobs should go to San Francisco residents; however, fear of legal challenges resulted in the City deciding to use the language of "economically disadvantaged" rather than "San Francisco residents" for the targeted population. For most people this was not an issue since they believed that, in the end, nearly everyone who would be using the City's workforce development system would be San Francisco residents.

Labor Agreements

Probably the single most controversial and contentious issue over which crafters of the ordinance struggled was inclusion of the collective bargaining clause. As one community organizer recalled, "People thought, aren't we just completely giving up the whole ordinance because in theory the unions don't want to cooperate." The language finally adopted in the legislation stipulates that "if a first source hiring agreement conflicts with an existing collective bargaining agreement to which an employer is a party, the collective bargaining agreement will prevail." (City and County of San Francisco, 1998)

Employer Incentives and Obligations

Advantages for the employer of participating in the First Source Hiring Program, according to the legislation, include access to a ready supply of qualified workers as well as access to hiring tax credits. Employers subject to first source hiring requirements are obligated to enter into a "first source hiring agreement" with the City, the terms of which are described in Figure 1.

Figure 1 - Key Elements of the SF First Source Hiring Agreement

- A projection of hiring and retention goals for entry level positions.
- Details on the employer's interviewing, recruitment and hiring requirements.
- Use of a 10-day window allowing first opportunity for economically disadvantaged job seekers who are using the City's workforce development system.
- A description of the process for providing notification of available entry level positions to the workforce development system so that the system can train and refer qualified economically disadvantaged candidates.
- Specifics of record keeping and monitoring requirements.
- Enforcement and sanctioning standards consistent with the first source hiring ordinance.
- The City's obligations to develop training programs, job applicant referrals, technical assistance and information systems that can assist the employer in complying with the terms of the agreement.
- Inclusion of notice vis a vis the first source hiring requirements in leases, subleases and other occupancy contracts.

Monitoring and Enforcement

Unlike most of the City's other hiring programs with compliance requirements, the First Source Hiring ordinance was not designed to rely on monitoring and enforcement by the Human Rights Commission. The ordinance specifies that it is the role of the FSHA to "determine appropriate monitoring and enforcement mechanisms to achieve the purpose of this Chapter." (1998) Employers failing to meet their "good faith" hiring obligations are subject to an assessment of liquidated damages, including $2,070 for every new hire for an entry level position "improperly withheld from the first source hiring process." (1998)

Governance and Advisory Bodies

Oversight of FSHP rests with the FSHA, a governing body comprising four City department directors, the president of the Private Industry Council of San Francisco, Inc., and other governmental representatives as deemed necessary by the FSHA. In addition to overseeing implementation of the ordinance, the mandate of the FSHA included management of the City's workforce development system (Refer to Appendix B for a full description of FSHA duties and responsibilities.) In addition, the legislation called for the establishment of a Workforce Development Advisory Committee (WDAC), a broad based, multi-sector body appointed by the Mayor and charged with advising the FSHA on workforce development, employment needs, program policy, design, implementation, oversight and monitoring.

Role of City Departments and Referring Agencies

The legislation mandates the cooperation of City departments with FSHA, including submittal of First Source Implementation and Monitoring Plans and ongoing submission of contractor information to First Source staff. The legislation provides the City with the authority to mandate the involvement of City department directors, City department staff, and employers subject to first source hiring requirements. However, it provides the City with no authority to mandate involvement of the referral agencies needed to furnish the supply side of the first source hiring labor exchange equation.

Financial Resources

The legislation does not specify how the First Source Hiring Program was to be supported financially.

C. *San Francisco's First Source Hiring Ordinance in Context*

Many first source hiring ordinances have been passed throughout the country since the late 1970s. The first such ordinance passed was in Portland, Oregon in 1978. Other municipalities that have passed first source hiring ordinances include cities such as Boston, Minneapolis, Berkeley, Oakland, and East Palo Alto. To place the San Francisco first source hiring initiative within a larger and comparative programmatic and policy framework, we conducted interviews with administrators operating first source hiring programs in Portland, Oakland, Berkeley and East Palo Alto. A synthesis of our findings is presented in this next section.

Incentives to Engage Employers

In Oakland the city requires any employer receiving loan or tax incentives through the Enhanced Enterprise Zone Community to sign a first source agreement. Portland and Berkeley use fiscal and zoning power such as the issuance of tax abatements and business loan incentives (Portland) or conditional use and building permits (Berkeley) to link employers to First Source requirements. East Palo Alto's leverage is provided through the city's Redevelopment Agency, which requires employers to sign first source agreements when they obtain redevelopment financing assistance or other City funding.

In San Francisco, participation in first source has been framed as a contractual obligation for employers that is not linked to a clear financial benefit. Although the preamble to San Francisco's First Source ordinance describes financial incentives available for employers (such as the Empowerment Zone tax credit or the recently sunset payroll tax credit) the benefits do not stipulate that recipients must have first source agreements.

All four comparable programs define their first source activities as a **business service**, providing screened, tested and prepared job seekers to employers at no cost. In fact, three of the four programs measured first source's success by the satisfaction of employers using the public job placement system. (The fourth, East Palo Alto defined success as no one complaining at a City Council meeting that First Source was not working for them).

> ***"FS agreements are excellent tools when public dollars are spent in the private sector. Not as a regulatory or bureaucratic devise but as a customer service."***
>
> —Portland's First Source Administrator

Goodfaith Efforts and Enforcement

Most first source programs rely on the good faith efforts of employers to hire job seekers from the public system. Because it's difficult to guarantee the quality of the pool of job applicants at any given time, few cities are comfortable mandating a quota. Instead, they rely on good faith efforts, which are as difficult to enforce as they are to define. Program administrators agreed that good faith efforts have "no teeth" and therefore are "largely unenforceable." Oakland's administrator explained, "Since it isn't legally binding, we are just deliberate about making it a good deal for businesses to comply."

None of the comparable programs consistently enforce first source agreements. In fact only one of the programs, East Palo Alto, has ever charged a fine for noncompliance, and they have only done so once. Portland has even removed from its ordinance the language about fines. The administrator explained, "the real hammer is tied back to their loan or tax abatement." All programs agreed that the best and most effective enforcement strategy is making participation in the public system in the employers' best interest because the referral services are so good. Portland's administrator explained, "FS agreements are excellent tools when public dollars are spent in the private sector. Not as a regulatory or bureaucratic devise but as a customer service." Program administrators in other jurisdictions agreed that enforcement was best achieved using the carrot instead of the stick.

If, alternatively, first source programs did choose to enforce agreements, the effort would be staff intensive. San Francisco's Redevelopment Agency, which monitors other local hiring agreements, has numerous staff dedicated to compliance. Similarly, until recently Oakland had three full-time staff monitoring compliance of their Local Hiring Program, LEP. LEP applies local hiring quotas (not only good faith efforts) to employment in city-funded construction projects. It requires 50% of local workforce hours go to Oakland residents on a craft by craft basis and 50% of new hires go to Oakland residents. Due to recent staffing cuts monitoring of LEP contracts has been significantly reduced. In sum, enforcing programs with quotas is staff intensive; enforcing agreements based on good faith, in all likelihood, is not worth the effort.

Integrating First Source into the System

In the four jurisdictions we studied, first source programs are integrated into the larger workforce development system and do not stand alone as separate programs. As Portland's administrator explained, "Our whole intent is to integrate the first source agreement and use it as a vehicle to show business how the system can serve them." She described first source as "an additional tool" for connecting qualified jobseekers with available positions. Oakland's integration is so extensive that when asked to identify the number of first source staff, the administrator included all training and referral community based organizations, and public or private agencies serving Oakland's jobseekers as "partners" in the first source program. Most of the program administrators we interviewed could not separate a first source budget from the city's One Stop budget.

In some cities, like Oakland, incorporation of the first source program into the budget priorities of the Workforce Investment Board did not happen without deliberate effort. In March 2002 Oakland's Workforce Investment Board (WIB) made a first source policy statement committing to integration. The statement read, "Incorporating a First Source policy as part of the Oakland WIB's budget priority establishes an effective framework for connecting workforce and economic development in the Oakland Workforce Investment Area." (Oakland Workforce Investment Board 2002)

Staffing and Budget

Without enforcement arms, first source programs do not have to be staff intensive. When pressed to count FTE hours dedicated to first source efforts, Berkeley identified 2 FTE, (25% administrator, 50% analyst and 110% employment specialists, plus some undefined about of clerical assistance), East Palo Alto has 1 FTE who is an Assistant to the City Manager, and Portland dedicates 50% time to an administrator.

Some first source programs have dedicated funding, others do not. Berkeley has a first source fund generated by 1% of any City-funded capitol project. The fund was $130,000 last year. To it the City added $380,000 from its general fund. The first source budget in Berkeley pays for marketing materials, an analyst who tracks data, pays bills and does the budget; and a secretary. Neither Portland nor Oakland has a separate first source fund. Although in years past first source activities in both cities were funded from the general fund, now all support comes through the Workforce Investment Act dollars. East Palo Alto does not have a separate first source fund but dollars extracted from developers do go to a fund for workforce training. The extractions are no set amount and are secured through "private inside deals."

Table 2. Key Design Features of First Source Hiring Programs

	Portland	Oakland	Berkeley	E. Palo Alto	SF
Year Founded	1978	1983	1986	1994	1998
Design Features:					
Relies on good faith	✓	✓	✓	✓	✓
Target Population	Residents	Residents	Residents	Residents	Low income
Type of jobs	Entry level	All types	All types		Entry level
Staffing level	.5 FTE	N/A	1.85 FTE	1 FTE	2.5
Operating entity	Nonprofit	For profit	One Stop	One Stop	City dept.
Enforcement	Removed	Not enforced	Not enforced	Minimal	Not enforced
Delivery system	Workforce development system	Workforce development system	Workforce development system	Workforce development system	Stand alone
FS hiring window	10 days	10 days	5 days	N/A	10 days
Leverage	Tax abatements, relocation assistance, small business loans and revenue bonds,	Enhanced Enterprise Community loans and tax incentives	Zoning and permits, financing or small business assistance	Financial assistance in Redevelopment Areas or other City funding.	Property permits and leases, service contracts

Sources: Interviews with First Source program administrators in other jurisdictions.

Organizational Structure

In Portland, oversight of the first source program is housed within the Portland Development Commission, a quasi-governmental agency responsible for overseeing the city's economic development, redevelopment and workforce development projects and programs. In Oakland the Economic Development department does the deal-making and first source activities are indistinguishable from the rest of the workforce system.

Berkeley's first source program was originally housed in the Mayor's Office of Economic Development, was moved to the Department of Health and Human Services, and there is discussion underway about moving it back to MOED. The East Palo Alto's City Manager's Office oversees its first source activities. All programs are woven into One Stop activities.

Effective Practices

Table 2 displays the key design features of the four comparable programs and San Francisco. From our review of the literature and our interviews with administrators operating programs in the four selected jurisdictions, we identified a list of effective structural and operational practices. These include: integration of first source hiring agreements into a city's existing workforce development system; using a business services rather than a punitive approach; linking first source activities to a city's economic development strategies; and using hard data to drive programmatic and policy decisions.

II. Program Description

In Section II, we briefly review the components of San Francisco's First Source Hiring model, as envisioned at program conception. This section also offers a short description of the start-up activities initiated in mid 1998.

A. The Program Model

—What were the theoretical assumptions and intended activities and outcomes at inception?

From the language in the first source hiring ordinance and from program documents and interviews with program founders, we developed a post-hoc conceptual model, shown in Figure 2, depicting the underlying assumptions, intended inputs, activities, outcomes and impact.

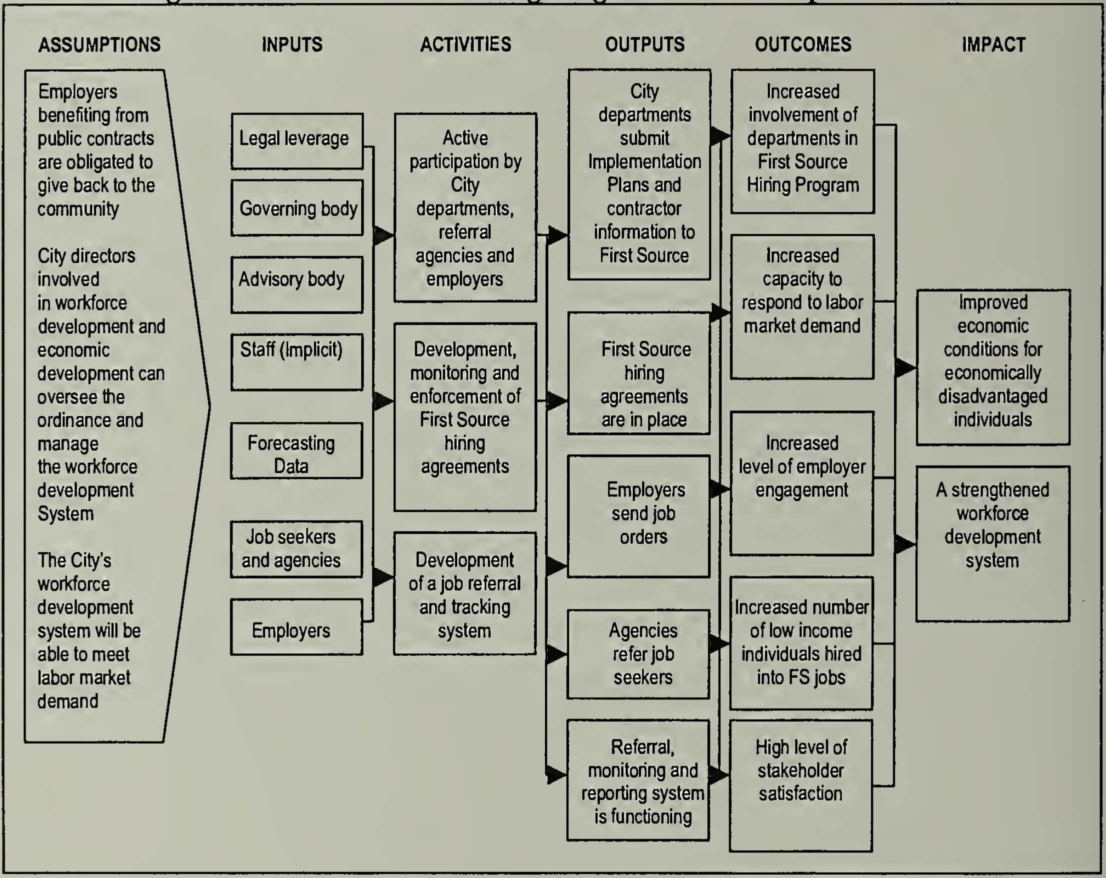
ASSUMPTIONS
INPUTS
ACTIVITIES
OUTPUTS
OUTCOMES
IMPACT
Employers benefiting from public contracts are obligated to give back to the community
City directors involved in workforce development and economic development can oversee the ordinance and manage the workforce development System
The City's workforce development system will be able to meet labor market demand
Legal leverage
Governing body
Advisory body
Staff (Implicit)
Forecasting Data
Job seekers and agencies
Employers
Active participation by City departments, referral agencies and employers
Development, monitoring and enforcement of First Source hiring agreements
Development of a job referral and tracking system
City departments submit Implementation Plans and contractor information to First Source
First Source hiring agreements are in place
Employers send job orders
Agencies refer job seekers
Referral, monitoring and reporting system is functioning
Increased involvement of departments in First Source Hiring Program
Increased capacity to respond to labor market demand
Increased level of employer engagement
Increased number of low income individuals hired into FS jobs
High level of stakeholder satisfaction
Improved economic conditions for economically disadvantaged individuals
A strengthened workforce development system

Figure 2. SF First Source Hiring Program: The Conceptual Model

1. Assumptions Underlying the San Francisco FSHP Model

Programs are rarely explicit about the assumptions that underlie their design. For the purposes of the evaluation, however, it was important to try to understand the set of beliefs upon which resources, activities, and intended outcomes were tied. Our review of program documents and our interviews with key informants suggest there were three key assumptions upon which San Francisco's ordinance and the program were based.

- *Assumption #1*: Employers benefiting from public subsidies or actions should contribute to the City's workforce development system by giving economically disadvantaged individuals the first opportunity to compete for entry level jobs.
- *Assumption #2*: An inter-departmental cadre of City department directors who share responsibility for the City's economic development and workforce development activities will be the governing body best suited to oversee implementation of the first source hiring ordinance and manage the workforce development system.
- *Assumption #3*: A workforce development system necessary to ensure a pool of qualified candidates will be in place.

As shown in Figure 3, the three assumptions form the basis of the supply and demand labor exchange and the management of that activity.

Figure 3 - The Theoretical Assumption Equation

Assumption #1	Assumption #2	Assumption #3
Employers benefiting from public actions are obligated to give back	**FSHA management of the linking mechanism and the system within which it works**	**Adequacy of the system to supply a pool of qualified candidates**
Labor Demand	←→	**Labor Supply**

2. Resources

The program was designed to rely *primarily* on existing City and community resources to carry out the legislated mandate. The ordinance includes no language about the financial resources needed to implement the program. The ordinance directs the FSHA to conduct the activities necessary to implement the program. Most program founders we interviewed said it had been the City's intention to staff the program with

3-5 staff. But as the project was being put together, explained one of the founders, the Committee on Jobs had already started to express its concern about the growth of city government, so the commitment was that the City would support FSHP with contributed staff. As this stakeholder went on to explain,

> "There was an effort to say, 'don't move this any faster than the organic pace with which the development is occurring.' As it started to become clear that the pace was going slower than even we had thought, then all of a sudden, we decided to really keep it slowed so that we didn't get into a situation where we've got a big staff sitting around doing nothing. ..Had either the stadium or Catellus moved at the pace they were originally supposed to be on, the dynamic would have changed enormously."

Given that the pace of development activity never did accelerate, and in fact the economy declined, for most of the tenure of the program, the staffing level has remained at 2.0-2.5 FTE, with funds for salaries and overhead provided primarily by DHS through 2003.

3. Activities

The activities necessary to carry out the legislative mandate fall into three broad categories: 1) enlisting the support of City departments and providing technical assistance to them as they develop their Implementation and Monitoring Plans; 2) developing, monitoring and enforcing first source hiring agreements between the City and employers subject to first source hiring requirements; and 3) developing a FS job referral and monitoring system.

FSHP: Intended Systems-Level Outcomes

- **Increased involvement of City departments in FS implementation**
- **Increased involvement of referring agencies in FS job referral system**
- **Increase in the number and preparedness of job seekers referred to FS jobs**
- **Increased involvement of employers subject to first source hiring requirements**
- **Stakeholder satisfaction with FSHP**

The first source hiring ordinance *explicitly* mandates City departmental cooperation with implementation of the first source hiring ordinance, beginning with departments' development of First Source Hiring Implementation and Monitoring Plans. The plans were meant to specify how departments would incorporate the goals of the first source hiring ordinance into their contract and monitoring procedures. These plans were to be developed with assistance from the FSHA during the first years of the program. The legislation specified that "to the greatest extent possible, the development of these plans shall utilize the department's existing contract monitoring procedures and facilitate a coordinated flow of information." (City and County of San Francisco 1998)

4. The Intended Outcomes and Impact

The intended outcomes included not just individual-level changes in the economic conditions of economically disadvantaged persons, but also changes associated with the workforce development system itself. Because the first source hiring ordinance is, at its essence, a linking mechanism, both sides of the equation—the labor demand side and the labor supply side—were expected to be strengthened, thus improving the workforce development system overall.

B. Program Start-Up

The job announcement issued by the Department of Human Services in 1998 recruited a Special Assistant for the First Source Hiring Program who would serve as the principal staff to the FSHA and have responsibility for "providing direction and coordination to implement the City's First Source Hiring Ordinance." The Special Assistant was to directly supervise two positions: an account executive position responsible for job postings and referrals, and a contract monitoring position for quality control and compliance.

The Special Assistant was initially strategically located within the Mayor's Office of Economic Development. The Special Assistant remained in the position for approximately one year. Unfortunately, there was a six-month lag before his replacement was hired. There was also turnover in the support staff position. Shortly after a second administrator was hired a decision was made to move the Administrator under the umbrella of DHS, where the one hired support staff was situated. This was intended to give the Administrator greater access to the City's workforce development planning and implementation; however, an unintended consequence of this relocation was, according to some stakeholders, a loss of mayoral clout and the severing of close ties with potential citywide economic development strategizing.

Activities Not Mentioned in the First Source Hiring Ordinance

Early into the implementation of the First Source Hiring Program, Catellus Corporation, developer of the Mission Bay Project, established a First Source Fund as part of the initial agreement negotiated with the City. The Fund, established with a commitment of $3 million dollars, stipulates that the funds "be used for the purposes of job training, referral and other activities of the citywide First Source Hiring Program as determined appropriate by the City. The First Source Hiring Program is a City program which identifies entry level positions to properly allocate training resources, and seeks to make available job opportunities for graduates of these training programs." The FSHA was given the responsibility of administering the First Source Fund. The first $1.5 million was contributed by Catellus when it obtained its first building permit; the first funds were distributed to job placement programs in July 2001.

III. Program Performance

—How effective has the program been in meeting its intended outcome objectives?

This section examines how effective FSHP has been in meeting its intended outcome objectives. We begin by reporting on the expected outcomes for San Francisco's economically disadvantaged job seekers and then review the program's effectiveness in meeting its intended systems-level outcomes.

A. *Individual-Level Outcomes*

Finding: Most of the jobs reported as attributable to FSHP have been in the construction industry. FSHP has had difficulty tracking the number of individuals hired into permanent jobs due to inadequate information

◆ ***Increased access to jobs for economically disadvantaged individuals.***

To assess the extent to which FSHP has increased access to jobs for economically disadvantaged individuals, we used the following set of indicators:

a) The number of job seekers hired into permanent jobs through 2003;
b) The number of job seekers hired into permanent jobs through the new FS referral system;
c) The number of job seekers hired into construction jobs through March 2004;
d) Wage ranges for these jobs (where data were available).

- *Number of low income job seekers hired for permanent jobs through 2003.* FSHP administrative records suggest that 32 individuals were hired through the formal job referral system into permanent jobs from January 1, 1999 through December 30, 2003. Qualitative data, however, suggest that perhaps as many as 157 additional individuals may also have been hired for permanent jobs. This would result in a total of 189 individuals placed in FS permanent jobs; however, we are unable to adequately verify these numbers. Nearly all jobs were in the service sector. No wage data were available.

- *Number of job seekers hired and wage levels for permanent jobs acquired through the "new" referral and job placement system operating through the One Stop System.* In early 2004, DHS' Workforce Development Division initiated new processes for screening, assessing and referring job seekers to FS jobs. Through this new system, 21 individuals were hired into jobs. The majority of these jobs were part-time; almost all the jobs provided benefits; and wages ranged from $10.28 to $12.00 per hour.

- *Number of job seekers hired for construction jobs through the first quarter of 2004.* Through the Mission Bay and Third Street Light Rail construction placement programs, 474 individuals were hired for jobs. Ninety-eight percent of all hires were ethnic/racial minorities; 67% of all hires were residents of San Francisco's Southeast neighborhoods. Approximately 60% of jobs were journey level.

Finding: Insufficient "buy-in" from City departments has weakened the implementation of the first source hiring ordinance. Through the end of 2003, less than 15% of City departments had complied

The two construction placement programs—Mission Bay and Third Street Light Rail— are managed by the FSHA in conjunction with the San Francisco Redevelopment Agency (SFRA) and are administered by the Private Industry Council of SF. Mission Bay has been funded with First Source Fund dollars; Third Street Light Rail is funded by MUNI. Since the inception of these programs, FSHP has used the number of job placements in these programs as a measure of the program's performance. We are thus reporting on those programs here, although we think the performance achieved by the two construction programs should not be used as a measure of FS success. Our conception of the ordinance is that it is a mechanism that "captures" jobs, but not that it operates training programs per se. Additionally, our interpretation of the ordinance is that it was really targeted at private development projects not under the jurisdiction of SFRA, which already imposes hiring requirements that are more stringent than those imposed by first source.

B. *System-Level Outcomes*

The first source hiring ordinance was conceived as a mechanism to increase economically disadvantaged individuals' access to entry level jobs. To be most effective, the program needs to engage key stakeholders—city departments, employers and referral agencies—in the implementation of the activities prescribed by the legislation.

♦ *Increased involvement of City departments in FS implementation.*

Because of the integral role of City departments in implementation of FSHP, an important intended outcome was increased involvement of City departments over time. To assess the level of City department involvement, we relied on the following indicators: a) the number/percent of City departments submitting Implementation and

Monitoring Plans, and b) the number of City departments submitting contractor data to First Source staff through 2003.

- *Number/percent of City departments submitting Implementation/Monitoring Plans.* Administrative records suggest that as of the end of 2003, only seven departments had submitted First Source Hiring Implementation and Monitoring Plans, as mandated by the First Source Hiring ordinance. With approximately 56 targeted City departments/agencies, this represents less than 15% compliance. All of the plans appear to have been developed and submitted during 1999.
- *Number of City departments submitting contractor data to First Source staff.* Administrative records suggest that as of the end of 2003, only eight City departments had submitted data to First Source staff about contractors subject to first source hiring requirements.

> *"We were clear in the legislation that we had to have a really effective relationship with all of the permit issuing operations of the City so we could track this stuff...If you don't have the information from the get go, none of this thing works."*
>
> —Key Informant

Overall, these data suggest that insufficient buy-in from City departments has weakened the intended implementation of the first source hiring ordinance. Through the end of 2003, less than 15% of City departments had complied with the requirements mandated by the first source hiring ordinance. As one City department staff commented about the ramifications of limited City department involvement, "There's a lot of stuff that just goes untapped."

Phase I of the program, which began in September 1998, applied to construction contracts over $350,000; leases of City property; grants and loans over $200,000 made by Mayor's Office of Housing (MOH) and Mayor's Office of Community Development (MOCD); and permits for commercial projects over 50,000 square feet. At a minimum, therefore, the city departments that *absolutely* needed to become involved during Phase I for the program to become operational were: MOH, MOCD, Department of Planning, Department of Building Inspection (DBI) and those with major construction contracts, including Department of Public Works, MUNI, the Port, the Airport, and Public Utilities Commission. The data we reviewed suggest that of these departments and agencies, MOCD, Department of Planning, the Port, the Airport, and PUC to varying degrees institutionalized the process for including first source hiring requirements into their contracting procedures. There is no evidence to suggest that MOH or DBI ever "got on board."

Table 2 gives a very rough indication of the potential, at least through Department of Building Inspection, that has gone untapped. During each of the four years for which we were able to obtain data, more than 50,000 construction permits were issued with a construction valuation ranging from a high of $2.9 billion in 2000-01 to a low of $1.5 billion the following year. While some of these permits would have been for tenant improvement projects, others were tied to commercial plans and other major projects that ostensibly would trigger first source hiring requirements.

Table 2. Number of Construction Permits Issued by Dept. of Building Inspection with Construction Valuation: 1998-99 – 2001-2002

	1998-99	1999-00	2000-2001	2001-2002
Approximate number of construction permits	55,700	57,680	59,840	59,180
Construction valuation of building permits	$2.4 billion	$1.6 billion	$2.9 billion	$1.5 billion

Source: Department of Building Inspection annual reports, 1998-99 through 2001-2002

The data we reviewed suggest that the only City departments to have *routinely* transmitted data about contractors subject to first source hiring requirements were DHS, MOCD, Planning and the Port. In our estimation, FSHP staff has been forced to operate without sufficient information inputs from City departments. As one of the program founders lamented, "We were clear in the legislation that we had to have a really effective relationship with all of the permit issuing operations of the City so we could track this stuff...If you don't have the information from the get go, none of this thing works."

It should be noted that although not legislatively mandated to be involved in FSHP implementation, one of the most cooperative agencies has been the San Francisco Redevelopment Agency (SFRA).[1] SFRA directors apparently have consistently directed staff to take action and "get on board" in support of the goals of FSHP. According to FSHP staff, SFRA staff regularly inform FSHP of meetings with developers/tenants when projects with permanent jobs are anticipated in a Redevelopment Area. FSHP staff said there is no formal relationship or memorandum of understanding between the SFRA and FSHP vis a vis monitoring and enforcement of employment compliance on the SFRA projects. As SFRA staff described, First Source hiring requirements are "kind of like on top of the existing employment programs that we already have and are already monitoring." FSHP staff suggests that these are "gray areas" that should probably get worked out for greater clarity vis a vis overlap of the City's hiring ordinances.

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[1] San Francisco Redevelopment Agency is not part of the City charter.

An underlying assumption within the program model had been that the onus was on City departments to identify employers and that First Source staff would have the necessary information to carry out the associated activities. Operationally this has proven to be cumbersome and perhaps unrealistic as it involves buy-in from many individuals who may have little or no interest in furthering the first source goal. As one City department director described about the limitations of City department involvement, "Implementation from our perspective is that we put in the conditions and we forward the conditions to [staff], and that's what implementation looks like to us. We are not an employment brokerage…have we done a perfect job on that? I doubt it. One of the things I've been struggling to set up for a number of years is a system that does this much better than hit or miss."

Finding: The level of involvement of referral agencies in both the FS construction and permanent job referral systems through 2003 never entirely coalesced to create an effective FS job referral system.

- ***Increased involvement of referral agencies in the FS job referral system.***

As suggested in the literature, one of the core requirements for an effective first source hiring program is the capacity to readily access a pool of qualified job seekers (Anderson 1999). A goal of FSHP, therefore, was "the creation of a seamless job referral system" (1998). One aspect of this would be the extent to which FSHP could involve referral agencies in the development and maintenance of the FS job referral system. To assess the extent to which this was achieved, we relied on three outcome indicators: a) the level of involvement by agencies in creating a FS job referral system for permanent jobs; b) the level of involvement of referral agencies participating in the referral system for construction jobs; and c) the percent of workforce development programs responding to FS postings for permanent jobs.

  - *Level of involvement of referral agencies in creating a FS job referral system for permanent jobs.* Workforce Development Advisory Committee meeting minutes (WDAC) from program inception through the end of 1999 suggest that many referring agencies were involved in the creation of a referral system for first source permanent jobs. The WDAC convened a Referral and Community Contacts subcommittee whose task was to develop a job referral system.

The subcommittee decided to use an existing DHS database, Powerline, to serve as a central data bank for FS jobs. The system was set up so that only agencies that agreed to use specific protocols would be allowed access to the employer contact information. In this way, FSHP hoped to ensure the quality of referrals. The plan was that the FS jobs would be funneled through a First Source staff person stationed at DHS. All contact with employers wanting to post jobs would be routed through the FS staff who, in turn, would fax the information out to the community of referring agencies.[2] Only the six or so "certified" agencies that had agreed to abide by specific quality control protocols were allowed to refer directly to the employer. Staff from the other referring agencies were expected to send job seeker applications to the First Source account executive, who would then forward the information on to the employer.

Unfortunately, the process of certifying agencies and giving those agencies direct access to the employers could not be maintained due to administrative challenges. The alternative system of faxing announcements to a broader group of non-certified referral agencies continued through 2003 in a diminished capacity. Most workforce development practitioners we interviewed said they thought the job referral system for permanent jobs had pretty much broken down. The referral system was recently reinvigorated by redirecting the referrals through the One Stop system.

- *Involvement of referral agencies participating in the referral system for construction jobs.* Construction jobs have been largely associated with two programs: the Mission Bay Construction Jobs Program, initiated in 2001, and the Third Street Light Rail Program, initiated in 2002. The system set up for referral of job seekers to construction jobs associated with these programs has relied on "lead agencies" to act as referral hubs. For both these programs, agencies experienced in working with the building trades were selected to act as the lead agencies. We do not know the exact number of referral agencies sending job seekers to the lead agencies, but by all accounts the referral system as originally envisioned has not worked well. Only 9 percent of the 291 placements on Mission Bay construction jobs through March 30, 2004, for example, originated with the referring vs. the lead agencies. Multiple factors—the short lead time available to find and refer candidates to construction jobs, the shortage of candidates with pre-apprenticeship skills, and turf issues—contributed to the construction referral system's shortcomings.

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[2] The decision to fax out the information rather than email was due to CBO's limited access to email in 1998; this decision has never been updated despite the fact that email is now widely available to referral partners.

- *Number of workforce development agencies/programs responding to FS postings for permanent jobs.* Some 46 community based agencies (CBOs) representing more than 100 programs are estimated to provide job readiness, employment training and job referral services to San Francisco residents (Stange 2002). In addition, publicly-funded agencies and institutions in San Francisco with workforce development programs include, at a minimum, Department of Human Services, City College, Mayor's Office of Community Development, National Council on Aging, and Department of Rehabilitation. In 1999, First Source developed a referral list of 58 workforce development program contacts to which staff would fax job postings for end use jobs. Administrative records suggest that from program inception in 1999 through the end of 2003, 20 unduplicated programs (34% of those receiving job notifications) referred job seekers to First Source for permanent jobs.

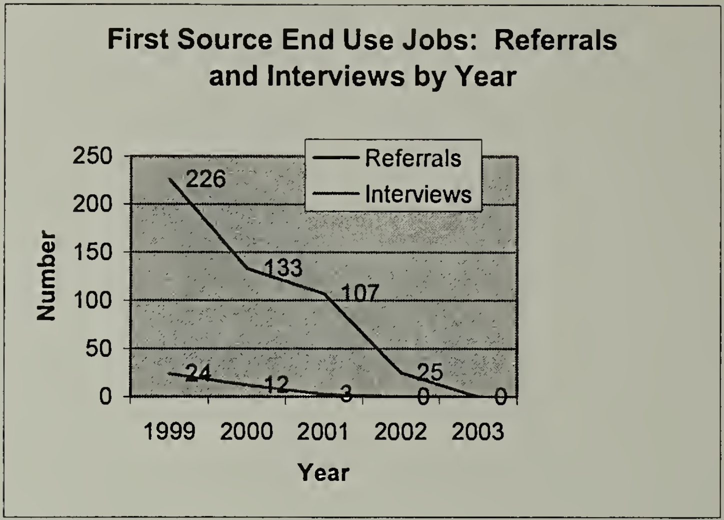
These data together suggest that through 2003, the level of involvement of referral agencies in both the construction and permanent job referral systems never fully coalesced to create an effective FS job referral system. In early 2004, however, the workforce development division of DHS initiated a new set of activities to reinvigorate the FS referral system for permanent jobs. These efforts appear to be paying off. Nineteen distinct referral agencies have participated in the new system in less than a 5-month period, resulting in the processing of 197 job seekers interested in FS jobs.

♦ *Increase in the size and level of preparedness of the FS labor force pool.*

An important aspect of creating a reliable, robust job referral system is the assurance that staff will be able to draw on a pool of qualified job seekers to meet labor market demand. To determine the extent to which this objective was achieved, we attempted to assess both the *size* of the FS labor force pool as well as *the level of preparedness of job seekers* within that pool. Outcome indicators included: a) the number of job seekers referred, by year, in both construction and permanent jobs, and b) employer satisfaction with the level of preparedness of job seekers referred.

- *Number of job seekers referred for end use jobs, by year.* As indicated in Figure 4, per administrative records, the number of job seekers referred for end use jobs declined from a high of 226 in 1999 to 25 in 2002. We could find no records of referrals for 2003.

Figure 4.



- *Number of job seekers referred for construction jobs.* Most stakeholders we spoke with said they thought the pool of qualified job seekers for construction jobs was not adequate. Between July 1, 2001 and March 31, 2004, in the Mission Bay Construction Placement Program, 504 individuals were referred for entry level and journey level construction jobs. With 548 job orders, the number of job orders clearly exceeded the number of qualified individuals available for referral to jobs, particularly in specific trades.

- *Employer satisfaction with preparedness of job seekers referred for permanent jobs.* Employers receiving referrals for permanent jobs felt that only a small percentage of referred candidates were adequately qualified; they also indicated that not very many people had been referred, suggesting that the pool is too small. Club Quarter Hotel, for example, interviewed 80-100 job referrals and ultimately hired 12 for entry level hotel jobs even though the number of positions available was much higher. Some of these employers also said there had been high turnover in their FS hires. At one employment site, for example, out of three hires, one individual worked less than one pay period, a second worked close to 6 weeks, and the third, who worked close to a year, left after repeated warnings and employer frustration with her work performance.

- *Employer satisfaction with preparedness of job seekers referred for construction jobs.* The number of construction employers we were able to speak with is so small that we hesitate to make any assertions. However, the issues that were raised we feel are important enough to comment on. These included: employers feeling pressured to hire individuals who they felt were not qualified. One employer said he had felt pressured to fire one of his employees in order to make room for a FS hire so that he could comply with first source hiring requirements. There was also some feeling that referring agencies might be benefiting financially when their first referral didn't work out, since they would be paid for subsequent placements.

These data suggest there is much work to be done to ensure the size and level of preparedness of the FS job applicant pool.

Finding: Employer feedback suggests there is much work to be done to ensure the size and level of preparedness of the FS job applicant pool.

- ***Increased engagement of employers subject to first source hiring requirements.***

One of the more obvious indicators to assess employer engagement *should be* the number of First Source Hiring agreements entered into, by year. The goal would be to have the number increase over time. Unfortunately, the data to make these counts are not available. FSHP has not kept an annual or cumulative list with names of employers subject to first source hiring requirements, presumably because these data were not consistently forwarded on by City department staff. There is also no cumulative list of employers who have entered into first source hiring agreements. In the ideal, FS employers subject to hiring requirements would have been entered into a newly created or existing database with fields that, at a minimum, would allow for sorting by year or employer type, e.g. construction, service, commercial development leases. Among these, FS staff would want to track the number entering into FS hiring agreements,

Associated with the absence of data on the number of employers with first source hiring agreements is the problem that, because standard protocols have not been used to develop the agreements, employers may not even be aware of their obligations. Within the realm of employers obligated through service contracts exceeding $200,000, for example, first source hiring agreements appeared to be mostly boiler plate agreements included as appendices to contracts, buried along with other agreements signed by the contractor, such as agreements "not to buy rosewood from Burma." Several employers we spoke with who have this type of boiler plate agreement said they had never been contacted by FS staff. It could well be that some City departments included FS language in contracts, but then never notified FS staff of the particular agencies who were subject to the requirements.

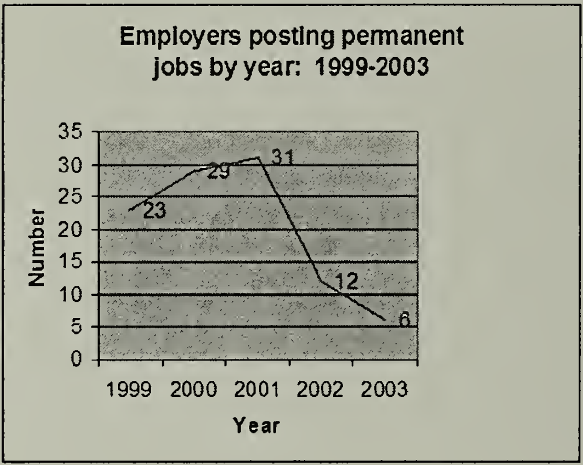
The agreements entered into with developers/tenants, on the other hand, appear to have been developed with much more interaction with FS staff and generally reflect customized, negotiated agreements, as we believe the ordinance intended. We reviewed a total of 24 employer files containing documents related to the potential development of first source agreements with commercial developers/tenants. Among this set of employers, 14 FS hiring agreements appeared to have been developed and signed between 1999 and the end of 2003.

Given the problems associated with using "the number of first source hiring agreements entered into, by year" as an indicator of employer involvement, however, we have relied on the following set of indicators: a) the number of employers posting orders for permanent jobs, cumulative and by year; and b) the number of unduplicated employers hiring FS job seekers for construction and permanent jobs.[3]

- *Number of employers posting orders for permanent jobs, cumulative and by year.* As shown in Figure 5, according to available administrative records, the number of unduplicated employers posting job orders for permanent jobs within a given year peaked at 31 in 2001, but declined thereafter. The majority of employers posting permanent jobs were nonprofit organizations. The cumulative number of unduplicated employers posting permanent jobs from 1999 through 2003 was 76.

- *Number of unduplicated employers hiring FS job seekers for construction jobs.* Administrative records compiled by PIC suggest that approximately 70 unduplicated employers hired FS job seekers for construction jobs through the Mission Bay and Third Street Light Rail Programs between July 1, 2001 and March 31, 2004.

Figure 5.



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[3] Initially we were also going to use "number of job orders" to try to assess how many jobs had been brought into the system, but we decided against it because we could not be assured of a consistent operational definition for "job order" during the period under evaluation.

- *Number of unduplicated employers hiring FS job seekers for permanent jobs.* Administrative records suggest that 22 unduplicated employers hired job seekers referred through FSHP for permanent jobs between January 1, 1999 and December 31, 2003.

To monitor and enforce employer obligations, FS staff needed to know which City contractors are subject to first source hiring requirements. As stated previously, there has been no functional system for tracking the number of contractors subject to first source hiring requirements, the number that have first source hiring agreements in place, or the extent to which those who have agreements are in compliance. In short, the absence of information has resulted in an inability to carry out the monitoring and enforcement components within the ordinance.

Finding: The absence of information has resulted in an inability to carry out the monitoring and enforcement components within the ordinance.

◆ *Stakeholder satisfaction*

We believe stakeholder satisfaction is one the most important indicators of a program's success. For this reason, we spent considerable time gathering stakeholders' perceptions, opinions and reflections about FSHP's role and accomplishments within the City's workforce development system. We conducted interviews with 36 individuals (see Appendix C for a list of interviewees) representing the major stakeholder groups: referral agencies, City departments, employers from construction and non-construction industries, and program staff.[4] Individuals were queried as to their perception of the effectiveness of the First Source Hiring Program, and asked to identify reasons for ineffectiveness, if that was their perception. Individuals were also asked to offer suggestions as to how the program could be improved. To try to assess job seekers' reactions to the "new system," we conducted two focus groups with job seekers who had recently participated in the "new system" of preparation and referral for FS permanent jobs. Our findings from the interviews and focus groups are organized by the dominant themes that emerged.

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[4] We made repeated attempts to secure interviews with several labor union representatives, but were unsuccessful.

DOMINANT THEMES THAT EMERGED:

SUPPORT FOR THE FIRST SOURCE HIRING CONCEPT

- **An important tool for ensuring access to jobs.** The majority of stakeholders said they thought the first source hiring ordinance was a valuable tool for trying to ensure that low income individuals gained access to jobs. Various stakeholders, particularly those representing low income communities, said they thought first source hiring agreements served the function of affirmative action programs from days gone by.

- **A concept lost.** Many stakeholders said they thought the original concept underlying the first source hiring ordinance had gotten lost during the past six years of implementation. Program founders and representatives within the workforce development system, in particular, said their conception was that FSHP would serve as a vehicle to strengthen the City's workforce development system by: 1) building a relationship between the economic development activity of the City and the people needing jobs, and 2) offering a compliance program for private development projects, something that had been lacking in the City's existing infrastructure when the ordinance was conceived.

LEVEL OF SATISFACTION WITH PROGRAM IMPLEMENTATION

- **Confusion regarding the scope/application of the ordinance and program mechanics.** Employers, City department staff and workforce development practitioners said there were problems related to stakeholders' understanding about the scope and application of the ordinance. Many cited confusion about the first source hiring ordinance's relationship to other City hiring requirements. Employers and City department staff, in particular, also said they felt there was a great deal of confusion about how, in practice, the program was actually supposed to work.

- **Inadequate job forecasting and job referral systems.** Across most stakeholder groups, interviewees said they thought First Source had not been able to set up or tap into the systems needed to forecast job opportunities. On the labor supply side, most workforce development practitioners said they thought the job referral and reporting system for permanent jobs had pretty much broken down. One practitioner characterized the problem as being one of having "no quality control, no analysis, no oversight of the system." There was a general perception that FSHP staff had basically given up trying to collect referral and placement data connected to FS permanent jobs.

- *Inability to monitor and enforce agreements.* As one stakeholder characterized the situation related to monitoring and enforcement, "They, CBOs, saw it as an important tool, but one that they had to wield, one that they had to enforce themselves."

- *Need for greater integration.* Workforce development practitioners, in particular, said they thought too little thought had been given as to how to integrate FS within the larger workforce development system early on. Transcripts from program founders suggest, however, that they had every intention of incorporating the ordinance's activities within the larger workforce development system. As one program founder told us, "First Source could never be on its own. All it is is a conduit for the other functioning systems."

- *Inordinate attention on funding specific projects instead of building FS capacity.* Most stakeholders said they did not really understand the connection of the first source hiring ordinance to the allocation of the FS funds. Several stakeholders complained that funds had been allocated to projects that did not even ensure hiring of the targeted FS population.

- *Insufficient links to economic development activity and incentives.* Many stakeholders lamented the irony that FS was supposed to link to economic development activity but could not because for years the City has been without an economic development strategy.

- *General satisfaction with the "new FS referral system" through One Stop.* Most of the workforce development practitioners we interviewed and all of the job seekers who participated in focus groups voiced satisfaction with the new FS referral system through One Stop.

LEVEL OF SATISFACTION WITH PROGRAM OUTCOMES

- *Untapped potential.* There was general consensus among most stakeholder groups that the FS potential to capture jobs has been largely untapped.

- *A loss of synergy.* Reflecting on why City departments had not really gotten on board, one program founder hypothesized, "The program lost synergy because people weren't getting placed. Even if all departments put contract language in and got into a permit routing process, department heads wanted clear instructions about how to implement, what to tell people. But the infrastructure wasn't there."

- *No benefits to employers.* Among employers we talked to who had hired FS job seekers, many were not satisfied with the level of preparedness of the job seekers who had been referred to them. In addition, employers and other stakeholder groups said the City had not been effective at using tax incentives to woo businesses to San Francisco.

FS LEADERSHIP, STRUCTURE AND ACCOUNTABILITY SYSTEMS

- *Too much inertia, not enough political support.* Many stakeholders said they thought the program had not received the political support it needed from the City. "If you're going to do anything in a bureaucracy, you have to stir the waves a little. If nobody does it, laws can sit on the books for years and nobody will enforce them and nobody will implement them until someone comes along and says, 'Hey!'"
- *An absence of proper oversight.* Many stakeholders said the FSHA had not adequately fulfilled its duties vis a vis First Source oversight. Among DHS managers and former managers, there also seemed to be agreement that, at an operational level, no one within DHS had really found the time to properly oversee the program.
- *Insufficient systems to ensure program accountability.* There was widespread feeling among almost all stakeholders that FSHP has had insufficient systems to adequately report back to stakeholders about its results.

SUGGESTED PROGRAM IMPROVEMENTS

- *Integrate the FS components into a reformed workforce development system.* The majority of stakeholders said they thought the only way to make First Source more effective would be to integrate the FS activities specified in the ordinance into a "reformed" workforce development system that connects to the City's economic development activity.
- *Adopt a business services rather than punitive approach.* Although there was not full consensus, most stakeholders we interviewed said they thought the program should place more emphasis on building mutually beneficial relationships with employers rather than on trying to enforce legal requirements.
- *Separate FS funding activities from FS implementation.* Many stakeholders said the activities associated with allocation of the FS Fund should be separated from implementation of FS activities.

- *Use a sector-based strategy.* Numerous stakeholders said they thought First Source should apply a sector-based approach to guide its scope of work.

- *Develop systems to ensure program accountability.* Across most groups, stakeholders said First Source should place much greater emphasis on tracking and reporting out on its activities.

As this section has described, the overall satisfaction level with FSHP implementation and outcomes was not high. However, only a few stakeholders said they thought the program should not continue. Most stakeholders were quite reflective about why they thought the program had not met with great success and seemed open to finding ways to strengthen the program with the hope of realizing better outcomes in the future.

C. *Factors Affecting Program Implementation and Outcomes*

As FSHP moved into its implementation phase, it was indeed hit by a confluence of factors that could be cited as affecting its performance: turnover among most of the founding staff and governance body; a serious downturn in the economy, that greatly affected private development projects; and a diminishing level of political support from City Hall. External factors such as these are bound to occur with any program. We focus instead on influential factors which we think the City's public policy makers do have the capacity to control. These include: 1) program governance and oversight; 2) the linking of the City's economic and workforce development activities and the role of the first source hiring ordinance within that conjoined system; and 2) the capacity of the City's workforce development system.

1. Program Governance and Oversight

A common perception among stakeholders was that FSHP had insufficient resources to carry out its legislated mandate. In our assessment, a more critical problem was the level of oversight and direction provided at the policy level. The data we reviewed suggest that FSHA members lost sight of—or perhaps because of turnover, never knew—the original vision underlying the first source hiring concept. FSHA meeting minutes and our interviews suggest that FSHA has concentrated much of its attention on management and allocation of FS Fund resources. We recognize that this task was delegated to the FSHA in 2001 as part of the Catellus Corporation's development agreement with the City (Hesse 2001). However, we believe this task diverted FSHA attention from the higher-level goals specified within the ordinance.

Related to this, many stakeholders said they thought the program concept had been "derailed" by the amount of attention focused on construction jobs and the allocation of funding for construction-related projects. "People did not realize that that (the FS funding) was just a very small piece of the intent of the legislation," said one stakeholder. "The FSHA was a victim of this focus on funding, and they really believed that their job was about this funding thing. The concept got diluted."

2. An Absence of Economic Development Strategies

As one program founder described, the first source hiring ordinance "was really about creating an ongoing pipeline of new jobs for low income people." For that to be done most effectively, the City needed have some strategies in place for bringing its workforce development and economic development activities together. Yet as most stakeholders reflected, the City has not had an economic development strategy. This sentiment was echoed by many stakeholders who shared the feeling that there have been too few discussions among public policy makers and community stakeholders to hash out key questions related to the relationship between economic and workforce development. As one stakeholder said, "We need to be asking: What kinds of businesses should the City try to attract, why, and who would they benefit?" Absent this discussion and the adoption of economic development policies and strategies, the vision behind the first source hiring ordinance—to use economic development forecasting to capture decent jobs for economically disadvantaged individuals—has had little hope of being fully realized.

> ***"We were presupposing that the City would in fact get its act together and that this conglomeration of programs would cohere into a system where you really understood both the pipeline of people and the pipeline of jobs...We knew that it had to become less amorphous for a program like this to work, so it was a little bit the chicken and the egg."***
>
> —One of the program founders

3. Capacity of the City's Workforce Development System

The third key factor which we believe has affected implementation and outcomes of FSHP is the state of the City's workforce development system. The first source hiring legislation adopted in 1998 gave the FSHA the authority not just to oversee the implementation activities of the ordinance, but also the authority to manage the City's workforce development system. The program founders must have believed that this would give them some level of control over the adequacy of the workforce development system. In actuality, the FSHA had no real authority to manage many of the tentacles of the workforce development system: programs operated by City College, pre-apprenticeship programs operated by unions, or programs that were privately funded.

What time would tell was that there was not an adequate workforce development system in place to provide the infrastructure for the first source hiring mechanism. Instead, the FSHA would find, among other things: a lack of pre-apprenticeship training to under-gird the construction placement programs; resistance among referring agencies to the concept of centralized job referral; fragmentation and redundancy within the City's own system of funding for workforce development programs; and no centralized information system to know who was being served, by whom, for how much, and with what results.

As one program founder said about the assumption related to the state of the workforce development system, "We were presupposing that the City would in fact get its act together and that this conglomeration of programs would cohere into a system where you really understood both the pipeline of people and the pipeline of jobs. And that there was some rationality to it...We knew that it had to become less amorphous for a program like this to work, so it was a little bit the chicken and the egg."

Even after the creation of the WIB, the FSHA was never absorbed into the new workforce development structure imposed by WIA, a legal mandate intended to improve local coordination of workforce development activities. Unfortunately, FSHA members never re-examined the role and authority of the FSHA following the establishment of the WIB. Thus is continued as a governing body that was legally mandated to manage a workforce development system over which it had little authority.

Unlike factors such as the economy and staff turnover, the three factors just described are ones that we believe the City does have the capacity to influence. The recommendations we have offered in Section IV offer some thoughts on how the City could update the governance structure of FSHP and initiate a process of collective dialogue and action. Aligning economic and workforce development activities and strengthening the capacity of the City's workforce development system would, in our view, go a long way toward helping the first source hiring ordinance to succeed.

IV. Conclusions and Recommendations

The evaluation has offered FSHP stakeholders an opportunity to reflect on the outcomes of an important initiative launched in 1998 to improve economic conditions for economically disadvantaged individuals. In this final section, we offer our conclusions and recommendations. We hope the evaluation has and will continue to spark a series of thoughtful discussions about how the City can most effectively move an initiative like the first source hiring ordinance forward.

A. Conclusions

1. The data we have reviewed suggest that the effectiveness of the ordinance as a mechanism to leverage jobs has yet to be tested. Key components of the First Source hiring program— involvement of City departments in job forecasting, the existence of a robust and reliable job referral system, sufficient capacity of the workforce development system, and a performance measurement tracking system—were not sufficiently in place to fairly assess the potential of First Source as a mechanism to "capture jobs."

2. Key legislative requirements within the ordinance were not adhered to consistently during program implementation. This included: 1) ensuring that FS hiring agreements were signed prior to approval of leases, contracts and permits, 2) requiring that employers subject to first source hiring requirements provide forecasting data on a regular schedule; and 3) providing employers with information about and access to financial incentives offered by the City.

3. Administration of the First Source Fund diverted the attention of the FSHA from its responsibility to shepherd the implementation of the first source hiring ordinance. As a result, the program did not receive the guidance necessary to ensure adherence to the underlying concept and an adequate level of legislative and program monitoring.

4. Most program stakeholders continue to support the concept underlying the First Source ordinance but most have been disappointed with the program's implementation. Many view the ordinance itself as a tool to "open doors" to jobs for populations that historically have had difficulty gaining access to employment opportunities.

5. Rather than relying on monitoring and enforcement to force compliance with hiring requirements, it is more practical, feasible and beneficial for the program to adopt a business services approach with employers subject to first source hiring requirements. Enforcement of first source hiring agreements has been operationally unrealistic. Additionally, we believe employers are more apt to want to engage in longer lasting relationships if they view the proposition as mutually beneficial rather than confrontational from the start.

6. Although the first source hiring agreement can bring specificity to the language of the City's other hiring requirements, we believe it should be applied strategically so as to minimize confusion among employers while maximizing benefits to job seekers. Rather than focusing on public works or SFRA projects where hiring requirements already apply, we believe FS would be best applied to private, commercial developments and purchasing contracts through the Office of Contract Administration.

7. Through 2003, FSHP operated as a stand alone program, operating outside the larger workforce development system. The intentions of the ordinance are more likely realized if the program components are integrated fully into the City's workforce development and economic development systems.

8. The modifications DHS' Workforce Development Division implemented in early 2004 to support First Source goals appear to be having a positive effect on program outcomes. These modifications have helped to reinvigorate the referral system for permanent jobs. Still to be addressed, however, is the issue of screening and quality control within the referral system set up to place individuals in construction-related jobs.

9. The First Source Hiring ordinance, as enacted, was designed in response to a specific set of circumstances. As economic and political conditions changed, structural weaknesses in the design surfaced. Modifications to the ordinance and redesign of the program will need to consider turnover in the City administration as well as economic fluctuations.

B. Recommendations

POLICY:

1) Reauthorize the First Source Hiring Ordinance within the context of the City adopting a "systems change" initiative to strengthen its workforce development system. As part of this initiative, establish a multi-sector Task Force similar to the welfare reform task force established in 1996.

   Rationale: The First Source hiring ordinance reflects a worthy concept that we believe has yet to be fully tested. Although the First Source Hiring Program (FSHP) achieved only marginal results during the past five years, the first source hiring concept continues to garner strong support from most stakeholders. They view the ordinance as an important tool for ensuring employment access for low income populations. The implementation problems FSHP has experienced, however, suggest that improved outcomes will only be possible to the extent that the City addresses structural and operational weaknesses within the City's workforce development system. Such an undertaking will require political will and a commitment to broad, multi-sector leadership and follow-through.

2) Amend the first source hiring ordinance to reflect current conditions and lessons learned. Suggested modifications include:

   (a) Transferring program oversight of the ordinance/program to a citywide workforce development governing body such as the Workforce Investment Board;

   (b) Eliminating the role of the Workforce Development Advisory Board from the legislation but drawing on the expertise of this group and beyond to form a multi-sector Workforce Development Task Force, one task of which would be to position the first source hiring program within a reformed workforce development system; and

   (c) Expanding employer options for meeting first source hiring obligations to include, for example: the provision of a designated number of annual on-the-job training opportunities and/or summer jobs for youth; the option to designate a fixed annual number of entry level employment slots for First Source job applicants; and the ability to contribute a one-time designated sum of dollars to the Workforce Development Fund for the option of "opting out" of first source hiring requirements.

   Rationale: (a) The FSHA was created prior to the formation of the Workforce Investment Board. The oversight function and authority for the program should be updated to reflect the changes resulting from the Workforce Investment Act. The first source hiring *ordinance/program should be overseen by a governing body that has broad authority for the City's workforce development planning and funding functions.*

(b) The expertise of the WDAC would be better used if applied more broadly to the purpose of helping to improve the City's entire workforce development system.

(c) The City is apt to develop stronger and longer lasting relationships with employers if employers' hiring obligations can be met through a broader range of hiring options.

3) Establish a Workforce Development Fund to replace the existing First Source Fund. Transfer responsibility for allocation of these funds to the Workforce Investment Board. Develop transparent policy guidelines for the solicitation and allocation of these funds. Consider using the Fund to fill "funding gaps" in the workforce development system.

   Rationale: Given the restricted nature of most federal and state funding for workforce development programs, it is in the City's best interest to use its unrestricted dollars to support activities that cannot be supported through normal funding streams. The governing body established by WIA to coordinate local planning and funding of workforce development programs is the WIB, therefore, we believe it is the appropriate body to manage and allocate the funds currently managed by the FSHA.

4) Establish a financial incentive, such as a payroll tax reduction, for employers who hire from the pool of first source job seekers, whether those employers have first source hiring agreements in place or not. Additionally, investigate which existing financial incentives could require participation in first source as a condition of receipt of the financial benefit.

   Rationale: First Source needs to give businesses something to create an "alignment of interests." Because FS imposes a good faith effort requirement on employers, it is not easily enforceable. The data we have reviewed suggest that the carrot holds more promise than the stick.

5) Locate First source policy activities in the Mayor's Office of Economic Development.

   Rationale: Implementation of First Source, as intended, will require employers to provide forecasting data that will be useful to the Mayor's Office of Economic Development for citywide planning. In addition, it is the MOED that will oversee business incentives. It makes sense to have First Source oversight and policy located within that department..

PROGRAMMATIC:

6) Integrate first source activities thoroughly into the workforce development system.

Rationale: First source should be one of many ways to get jobs into the public system. Job seekers should not be able to distinguish first source staff or jobs from any other staff or jobs within the workforce development system.

7) The First Source Hiring Program should adopt a business service model rather than relying on a punitive model based on enforcement of agreements.

   Rationale: Enforcement of first source hiring agreements has been operationally unrealistic. Additionally, San Francisco is more apt to be perceived as an attractive business locale if it is recognized as offering employers benefits rather than recognized as a difficult city in which to do business.

8) Develop adequate information and operational systems to ensure that key legislative requirements within the ordinance are adhered to consistently during program implementation. This includes: (1) ensuring that First Source hiring agreements are signed prior to approval of leases, contracts and permits; and (2) requiring that employers subject to first source hiring requirements provide forecasting data on a regular schedule.

   Rationale: FSHP currently has no systematic method of working with City departments to acquire ongoing data about contractors subject to first source hiring requirements. The program has not been able to track and report on the number of employers subject to first source hiring requirements nor has it been able to document how many of these employers have complied by entering into first source hiring agreements. Developing information and operational systems to track these numbers should be one of the program's first and highest priorities.

9) Assess the ramifications of pursuing first source hiring agreements from residential developers.

   Rationale: To date, FSHP has not pursued first source hiring agreements with developers of housing projects. Given the scope of job opportunities that could emanate from the housing bond, FSHP should assess the potential of capturing construction and permanent jobs through this venue.

10) Develop a performance-based implementation plan, to include identification of realistic and measurable annual performance targets tied to the legislative mandate. Report to governing body and community stakeholders on performance outcomes at regular, established intervals.

   Rationale: Many of the difficulties FSHP has experienced, we believe, are due to the absence of a strategic or implementation plan. Development of such a plan will give staff a "roadmap" *to guide their activities and ensure proper programmatic direction. This would also help staff to have greater clarity about annual performance expectations. Staff should be able to report back to stakeholders about agreed-upon performance targets.*

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Appendices

Appendix A - Data Collection Methods and Sources

DATA COLLECTION METHODS AND SOURCES

The evaluation team relied on multiple data collection and analytical methods. These included: interviews with program stakeholders, facilitation of focus groups, employer phone surveys, document review, retrieval/analyses of automated and hard copy data files, and a literature review. Each of these methods is described briefly below. In addition, we convened an evaluation advisory committee comprising representatives from most of the program stakeholder groups. The committee members met three times, offering input on the evaluation's priory areas of focus and preliminary findings.

INTERVIEWS WITH KEY INFORMANTS

We conducted face-to-face and phone interviews with two sets of key informants: 1) program stakeholders, and 2) administrators operating first source hiring programs in other jurisdictions.

Program stakeholders

We conducted 36 semi-structured interviews with key informants representing most of the stakeholder groups: staff representing City departments; staff representing referral agencies within the City's workforce development system; program founders; FSHP staff and former staff; employers; and representatives from both the Workforce Development Advisory Committee (WDAC) and the First Source Hiring Administration (FSHA). We asked permission to tape the interviews and in all cases this request was granted. We used an interview guide consisting of a set of pre-determined questions, with some adaptations for different stakeholder groups. The interviews were loosely structured. Interviews ranged from 30-90 minutes. These interviews were conducted between March 3, 2004 and May 24, 2004.

We transcribed the audio tapes from each interview. We developed an index of categories relevant to the evaluation. Each of the two evaluation team members read and coded each transcript and then developed dominant themes within the pre-determined categories, e.g. structure, governance, perceptions of effectiveness. To try to ensure inter-coder reliability, we did not compare findings until we had both read and analyzed the transcripts.

Program administrators in other jurisdictions

To try to understand the San Francisco First Source Hiring Program within a larger context, we selected four jurisdictions that were operating first source hiring programs and conducted interviews with the administrators of those programs. We selected Portland because it was the first city to pass a first source hiring ordinance in 1978. We selected the three remaining cities, East Palto Alto, Oakland and Berkeley due to a presumed similarity of contextual factors. From these sites, we interviewed a total of five staff that had direct responsibility for managing and operating the programs. All of these interviews were conducted via the phone. We used a structured set of predetermined questions. In several cases, administrators emailed additional information to us or called back with additional information.

FACILITATION OF FOCUS GROUPS

We conducted two focus groups with job seekers who had recently participated in an orientation to the "new" referral system for First Source jobs conducted at the One Stop Center at 3120 Mission Street. We recruited the focus group participants using a flyer that was distributed to job seekers attending the orientation sessions at the One Stop Center. Participants were paid $25 for their time. The sessions were audio-taped and later transcribed. Eleven job seekers participated in the two focus groups. The facilitator used a prescribed set of prompts, asking focus group members to give their perceptions of the services they had recently received through the new job referral system.

EMPLOYER PHONE SURVEYS

In addition to the interviews we conducted with employers who served as key informants (listed in Appendix C), we conducted phone surveys/interviews with a very small sample of employers (5) who had hired job seekers referred to them through FSHP. The sample included employers who had hired job seekers for construction-related and permanent jobs.

DOCUMENT REVIEW

During the course of the evaluation, we reviewed and gathered data from many program-related documents that dated from mid 1998 through mid 2004. These included, but were not limited to: internal correspondence between FSHP and City department personnel; correspondence with developers and employers; meeting minutes of the FSHA; meeting minutes of the WDAC; drafts of program reports; first source hiring agreements for commercial projects, City service contracts and construction contracts; and annual reports of City departments.

ADMINISTRATIVE RECORDS

We relied on both automated records and hard copy records to try to determine levels of involvement of various stakeholder groups and outcomes for job seekers. As mentioned in the body of the report, we believe FSHP has had inadequate information systems in place to reliably track performance outcomes, particularly those associated with permanent jobs. During 1999, data were input into DHS' Oasys system. Staff also kept an Excel spreadsheet with more or less these same data because they did not have confidence in the Oasys system. The Oasys database that we reviewed had virtually no records input as of December 2002. We reviewed all of the employer files for all years that FSHP had been operational to try to check the reliability of the data that had been entered into the database and to fill in where no automated data were available. Although we made every attempt to cross check data from multiple sources so as to accurately reflect FSHP outcomes, we nevertheless believe the numbers should only be taken as an approximation of the activity that actually transpired.

To assess outcomes associated with the construction placement programs, we requested both paper reports and the automated database managed by the Private Industry Council of San Francisco. We were given access to the Access database, containing records for Mission Bay and Third Street Light Rail programs. We have every confidence in the data we reviewed and ultimately queried to obtain information about the construction placements.

Lastly, we requested from DHS' IT Department data reflecting the activity that has occurred through the new FS job referral system operating through the One Stop system. The database we received uses a new version of Oasys and contained records for the first five months of calendar year 2004.

Appendix B - Duties of the First Source Hiring Administration

DUTIES OF THE FIRST SOURCE HIRING ADMINISTRATION

(Excerpt from Chapter 83 of the San Francisco Administrative Code)

Specifically, the ordinance calls on the FSHA to carry out the following tasks:

1) Assist City departments in the development of their Implementation Plans;

2) Work with the Department of City Planning and the Department of Building Inspection to establish conditions based upon first source hiring agreements for development projects;

3) Work with employers and unions to identify entry level positions for economically disadvantaged individuals;

4) Manage San Francisco's workforce development system;

5) Determine appropriate monitoring and enforcement mechanisms;

6) Develop written regulations to implement first source hiring;

7) Enter into cooperative agreements with other SF governmental agencies;

8) Conduct independent audits of City departmental implementation, monitoring and enforcement of the requirements of the ordinance;

9) Prepare an annual report on the progress of the program for presentation to the Mayor and Board of Supervisors;

10) Submit all approved first source hiring implementation and monitoring plans to the WDAC for review; and

Appendix C – List of Key Informants and Affiliations

LIST OF KEY INFORMANTS AND AFFILIATIONS

Steve Arcelona, Chief of Staff
SF Dept. of Human Services

Larry Badiner, Acting Director
SF Planning Department

Jesse Blout, Director
Mayor's Office of Economic Development

Pam Calloway, President
Private Industry Council of SF, Inc.

Robert Carlson, Director
SF Department of Public Works

Virginia Dario Elizondo
SF City Attorney's Office

Pamela David, Executive Director
Walter and Elise Haas Fund

Dr. Philip R. Day, Chancellor
City College of San Francisco

Amanda Feinstein, Program Officer
Walter & Elise Haas Fund

Rodney Hampton, Program Manager
Young Community Developers

Don Hesse, Administrator
First Source Hiring Program

Sharen Hewitt, Consultant
First Source Hiring Program

Camille Hooker, Staff

Chris Iglesias, Contract & Fiscal Services
Manager
SF Redevelopment Agency

Dwayne Jones, Director
Mayor's Office of Community
Development

Jim Kennedy, Former Manager
PIC of San Francisco, Inc.

Angelo King, Executive Director
SF Neighborhood Jobs Initiative

Tony Lugo, Manager
DHS Workforce Development Division

Will Lightbourne, Director
County of Santa Clara Social Services
Agency

Kathy Mallegni, Human Resources
Port of San Francisco

Don Marcos, Executive Director
Mission Hiring Hall

Phyllis McGuire, Associate Vice
Chancellor
City College of San Francisco

Olga Muñoz, Account Executive
First Source Hiring Program

Roxanna Morales, Job Club Facilitator
First Source Hiring Program

First Source Hiring Program
Key Informants and affiliations, continued

Nathan Nayman, Executive Director
San Francisco Committee on Jobs

Sanjeev Raj, Manager
Club Quarters Hotel

Diana Rathbone, Contract Compliance Officer
SF Public Utilities Commission

Trent Rhorer, Executive Director
SF Department of Human Services

Tom Ryan, Community Services Director
SF Central Labor Council

Zelda Saeli, Program Manager
PIC of SF, Inc.

Anna Shinko, Attorney
Home Depot

Abby Snay, Executive Director
Jewish Vocational Services

Sylvia Tiongson, Program Assistant
SF Dept. of Human Services

Sam Tuttelman, VP, Workforce Development
Goodwill Industries

Ted Wang, Former Policy Director
Chinese for Affirmative Action

Brian Murphy, President
De Anza Community College

Interviews with First Source Hiring administrators in other jurisdictions:

Delfina Guiken
Employment Program Administrator for the City of Berkeley

Al Auletta
Executive Director
Workforce Invest Board
Oakland

Deborah Barnes
Manager
Division of Contract Compliance and Employment, Office of the City Manager
Oakland

Marie McKenzie
Assistant to the City Manager
East Palo Alto

Janice Frater
Project Manager
Work Systems, Inc.
Portland

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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MINUTES OF THE SEPTEMBER 15, 2004 MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held in the Auditorium of Community College District Office located at 33 Gough Street in San Francisco, California.

PRESENT:
Pamela Calloway, Anni Chung, Nicholas de Lorenzo, Gregg Fortner, Aileen Hernandez, Dwayne Jones, Curt Kirschner, Leslie Luttgens, Nathan Nayman, Darlene Rutkowski, John Poremba, and Tom Ryan

ABSENT:
William Allen, Michael Blecker, Rosalie Bulach, Lynn Bunim, Kathye Citron, Ann Cochrane, Kimberly Cousin, Philip Day, Theresa Feeley, Sally Gallegos, Linda Grohe, Phyllis Jackson, Nate Mason, Sonia Melara, Brian Murphy, Craig Newmark, Victor Revenko, Trent Rhorer, Ave Seltsam, Dana Serleth, Abby Snay, Erika Thorson-Garay, Stan Warren and Dan Whooley

STAFF:
Alice Chiu, Wes Dixon, Raymond Holland, and Zelda Saeli

PUBLIC (AS EVIDENCE BY SIGN-IN SHEET):
Steve Arcelona, Lorraine Giordano, Elizabeth Hewson, Tiana Wertheim

The meeting was convened at 2:10 PM. A quorum was not established.

Item 3 – First Source Hiring Ordinance

Don Hesse presented a brief overview of the First Source (FS) Hiring program and amendments to the Ordinance. The program in legislation was adopted in 1998, created before the establishment of the WISF Board. The program is not assigned to a specific department. Mr. Hesse reports to the First Source Hiring Administration (FSHA) Committee. The FSHA Committee consists of four department heads (who also serve on the WISF Board): Trent Rhorer of Department of Human Services, Dwayne Jones of Mayor's Office of Community Development, Pamela Calloway of Private Industry Council, Marsha Rosen of Redevelopment Agency, and Philip Day of City College of San Francisco. The legislation also created a Workforce Development Advisory Committee to advise the FSHA Committee on first source.

The program was for five years, with a sunset provision that expired last fall. The FSHA Committee approached the Board of Supervisors to extend the program. The Board of Supervisors approved the extension on the condition that the program is evaluated. San Francisco Urban Institute was a successful bidder to evaluate the program and chose Georgina Hernandez and Tiana Wertheim to conduct the evaluation. Ms. Hernandez and Ms. Wertheim reported to the Executive Committee at their last meeting on August 11th. The legislation is set to expire mid October. In order to have the program reauthorized, two things had to be done, extend the program without making any changes in the legislation or make changes that could be done on a short term basis in order to get the program reauthorize and then look at the bigger picture in context with overall workforce development system. Mr. Hesse expects, in the next 12 to 18 months, a significant amount of change that deals with workforce development in San Francisco.

Pamela Calloway informed the Board that they have the First Source evaluation, the proposed revised legislation and a comparison sheet prepared by Don Hesse.

Don Hesse informed the Board that Supervisor Sophie Maxwell drafted initial changes and introduced it to the Board of Supervisors on August 15th. This was then forwarded to the Rules Committee. The item had to undergo a 30-day waiting period for comments from the public. The Rules Committee meets next Wednesday. The proposed legislation incorporates Sup. Maxell's changes, FSHA's suggestion and recommendations from the evaluation that were thought that could be implemented on a short-term basis.

Amendment #1

Threshold is lowered to $50,000 (from $200,000). Sole source contracts are included in the program. Also include phrase "or when aggregate contracts from all City departments exceed $200,000".

The rationale being that because the program is seen as a benefit for employers, it should be extended to as many employers as is reasonable which would also increase the number of potential jobs. One of the questions was that whether the City can require that a FS employer submit all of their vacant entry-level positions to the FSH Program even if those positions are not funded by the contract with the City.

The pro and con points include the best use of limited resources; the benefits of just exposing employers to FS and the One Stop System regardless of the number of entry level jobs they can produce; focusing on the benefits of participating in the system rather than focusing on the compliance monitoring aspect.

There is a longer-term issue. If the City's current affirmative action employment programs [Admin. Code Chapter 12.B] are found invalid based on Prop.209, the City will be left without any employment requirements for city contractors aside from construction contractors who have a separate 50% local hiring requirement. First Source then becomes the only employment requirement for City contractors, which might be sufficient reason to expand it to as many employers as possible.

Nathan Nayman asked if the program benefits employers, why aren't they utilizing it. Lowering the threshold to forces them to use it. He suggested that the program should be more attractive.

Don Hesse commented that he does not see this as imposing but sees this as a "selling opportunity" to show them the system. He emphasized that he can't make them participate. He wants them to continue to use the System for future higher positions. There is currently no enforcement. Their only requirement is to consider hiring from the System for their entry-level jobs, referring to the Ordinance on pages 18 and 19.

Dwayne Jones commented that if the employers hire outside of the System, they should provide a rationale. Don Hesse replied that the City has a right to demand to see the qualifications of the person they hired instead. If that person didn't meet the qualification, then can enforce the employers to hire from the System. However, there aren't enough resources to follow up on the hiring.

John Poremba commented that if there isn't resources for enforcement then why not recommend removing the sanctions out of the law. Don Hesse replied that he would rather use the time and resources to encourage employers to use the System.

Tiana Wertheim added that the evaluation team acknowledged that enforcing the sanction is unrealistic given the resources, staff and budget given to this program. However, even using a "phantom stick", as used by some CBO's, can "encourage" employers to be in compliance.

Tom Ryan commented if voluntary compliance would work then FSHA wouldn't be necessary. He stated that everyone should be realistic and open about how to enforce goals of FSHA including use of a "small stick" to prod the System. This could be an educational process for employers.

Don Hesse replied, from his experience, employers are not resentful in using this service. This is an opportunity to sit down with the employer and talk about what service the System can provide. The more forceful, the less attractive to employers to use the System.

Aileen Hernandez commented that it is essential to enforce the ordinance. The data on employment of city residents is terrible. It is the responsibility of Board to encourage employers to hire from the System.

NNathan Nayman stated that the Board of Supervisors has thwarted economic development in the city. He added that the City needs to have incentives in order to generate economic opportunities. He informed the Board that he will offer amendments to the legislation and meet with the Supervisors. He will give amendments to Ms. Calloway prior to presenting them to Rules Committee (for distribution to the Board). He added that the City should market the One Stop.

Dwayne Jones commented that these amendments are needed to stay in place.

Tiana Wertheim commented that the evaluation points not included in ordinance are: (1) tighter requirements for forecasting data; (2) additional options for employers (summer jobs, allowing an opt out option by writing a check); and (3) link to employer financial incentives (eg. Empowerment zones).

Don Hesse commented that all of the recommendations in the evaluation were considered. The first thing addresses the issue of the paradox - want a carrot, not a stick, approach.

Tiana Wertheim replied that the carrot is that we want to be sure by the time those jobs are available, have qualified job seekers ready for the employer. Want to ensure that our "training arm" is training for jobs that FSH needs.

Tom Ryan added that if forecasting data is available, then we would know what the jobs are and be able to train our participants according to those available jobs.

Curt Kirshner objected using a stick when there is no intent to enforce it.

Dwayne Jones responds that there is enforcement at the CBO level (ala Home Depot).

Aileen Hernandez concurred with Ms. Wertheim and added that it is a benefit to the employer to have a plan that included forecasting.

John Poremba asked Ms. Wertheim if she had spoke to employers about whether they can forecast more than 6 months in advance. Employers are usually reluctant to release that data due to competitors.

Tiana Wertheim replied that she did speak with employers and it depended on what kind of business. Large hotels, for example, know their opening plans, number rooms, and their personal needs.

Amendment #2
Residential development is included.

The rationale is that at the time the original ordinance was passed, most residential construction was taking place in redevelopment areas that had employment programs. Now, much of the large private sector development is residential and there is no reason not to include it in the program.

Tom Ryan asked about journeymen and apprenticeships.

Don Hesse replied that apprenticeships remain whatever is in the collective bargaining, usually one apprenticeship for every five journeys.

Aileen Hernandez asked what is the Workforce Development Advisory Committee, commenting that, "there's always a separate group for a separate meeting". She emphasized the need to integrate the discussion. Tom Ryan agreed that everyone needs to be at the same table at the same time to have same discussions.

John Poremba commented that there should be formal relationship circulated in Ordinance between WDAC and WISF Board.

Pamela Calloway informed the Board that she will provide the Board's comments to Supervisor Sophie Maxwell.

Public Testimony on Non Agenda Items
There was none.

The meeting was adjourned at 3:30 PM.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

[Note the attached letter to Supervisor Sophie Maxwell regarding a summary of the Board's comments on the First Source Hiring Ordinance amendments.]

22 September 2004

Honorable Sophie Maxwell
Member, Board of Supervisors District 10
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102

RE: First Source Hiring Administration Ordinance

Dear Supervisor Maxwell:

Thank you for introducing an Ordinance to amend the San Francisco Administrative Code sections 83.4, et.seq: The First Source Hiring Administration Ordinance ("the Ordinance"). This Ordinance is a critical component of an effective economic, community and workforce development strategy for San Francisco.

On September 15, 2004 the Workforce Investment San Francisco ("WISF") Board convened in a Special Meeting to discuss the proposed amendments to the Ordinance. The WISF Board, 49-members appointed by the Mayor, is a business-led Board that brings together public and private, for-profit and nonprofit, civic, community and industrial leaders to create a forum for strategic action to build the local workforce and ensure that San Francisco employers can quickly meet their needs for skilled workers.

The Board reviewed both the *First in Line: An Evaluation of San Francisco's First Source Hiring Program,* the program evaluation that was completed by the San Francisco Urban Institute and the amendments to the Ordinance that you have proposed. The Board did not take any formal action at its meeting on September 15; however, I trust that you will find the following comments from the Board's discussion helpful as the Rules Committee considers the Ordinance.

1. **Reauthorize the Ordinance within the context of the City adopting a "systems changed"[1] initiative to strengthen its workforce development system.** Board members strongly agree with the evaluators that this Ordinance is and should be a component of a comprehensive, integrated, effective economic and workforce development system in San Francisco. The Board is aware of and participates in Mayor Newsom's prioritization of community and economic development in San Francisco. Pursuant to comments from Gregory Assay of your office to the Executive Committee on August 11, 2004, the Board understands that you anticipate further amendments to the

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[1] Excerpt from Policy Recommendation 1) of *First in Line: An Evaluation of San Francisco's First Source Hiring Program, August 2004, San Francisco Urban Institute.*

Ordinance during the next eighteen (18) months that will ensure that the Ordinance is consistent with the Mayor's leadership and initiatives in this system-building priority.

2. **Focus on business services and benefits, while maintaining an ability to enforce the ordinance.** There was considerable discussion on whether the Ordinance and other workforce services (i.e. the One Stop System) should be offered to employers solely as an incentive to do business in the City or whether there should also be a "stick" to compel efforts to hire City residents. Board members reached consensus on the desirability of job creation and business attraction in San Francisco, and on the need to better inform employers of the benefits (workforce and otherwise) of locating in San Francisco. The Board also noted that the very existence of the Ordinance indicates that voluntary compliance is not sufficient to ensure desired outcomes.

3. **Increase the kind and quality of data available from the First Source Program.** Board members wholeheartedly endorsed the amendment (section 83.6(b)(9)) that calls for specific data to be included in annual reports on the program. Further, the Board is very interested in both performance data as well as the data that can be shared by and between City agencies, and forecasting data that may be available from employers as tools to enhance the economic development efforts of the City.

4. **Coordinate strategies: need same people at same table at same time to discuss same issues.** Board members support the removal of "managing the San Francisco Workforce Development System" from the powers and duties of the First Source Hiring Administration (the Ordinance, section 83.6(b)(4)). Members expressed a strong desire to coordinate and organize the City's many conversations and strategies about workforce, community and economic development. The WISF Board and its component organizations look forward to the continued leadership of Mayor Newsom and you in this matter.

Thank you for this opportunity to inform you of the WISF Board's consideration of this important Ordinance. Please do not hesitate to contact me at 923.4465 should you need further information.

Warm Regards,

Pamela Calloway

Pamela S. Calloway
Chief of Staff

cc: WISF Board Members and Staff

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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City Hall, Room 244
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Issued: Tuesday, October 12, 2004

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, OCTOBER 20, 2004

1. Adoption of the Agenda *(Action Item)*
2. Adoption of Minutes from the Meetings held on June 16, 2004 and September 15, 2004 *(Action Item)**
3. Public Testimony on Agenda Item (Discussion Item)
4. Presentation
   - A. San Francisco Labor Market by Kevin Stange
   - B. Research Brief: San Francisco's Aging Workforce by Kevin Stange*
   - C. Delivering Digital Diversity by Lorraine Giordano*
5. Proposed Action: Approval of Bylaw Amendments (Discussion/Possible Action Item)*
6. Executive Committee Recommendations*
   - A. Proposed Action: Ratification of Year 9 of the Homeless Employment Collaborative Recommendations
   - B. Proposed Action: Ratification of Acceptance of Community Development Block grant (CDBG) Funds to Operate the Tax Credit Vouchering Project in PY 2004
   - C. Proposed Action: Ratification of Jewish Home for the Aged Customized Training Proposal to Operate a Certified Nursing Assistant Training Program
   - D. Proposed Action: Ratification of Recommendation for PY04-06 Youth Service Request for Proposals Solicitation for Services to Youth Residing in the Bayview-Hunters Point, Oceanview-Merced-Ingleside, Sunnydale and Western Addition neighborhoods
   - E. Proposed Action: Ratification of Recommendation for Federal Fiscal Year (FFY) 2004 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) Formula Allocations and County Plan Goals
7. Committee Reports (Information Item)
   - A. Finance Subcommittee
   - B. Employer Services Committee
   - C. One Stop Operations and Services Committee
   - D. Program Resources Committee
   - E. Youth Council
8. Chair's Report (Discussion Item)
9. President's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)
11. Adjournment *(Action Item)*

*Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** SEPTEMBER 20, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

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SUBJECT: STAFF RECOMMENDATIONS: PROPOSED BY-LAW AMENDMENTS

ACTION REQUESTED

The WISF Board is asked to adopt amendments to the Bylaws. These amendments will be considered at the scheduled October 20th meeting.

BACKGROUND

WISF Board Bylaws provide that “the Bylaws may be amended at any meeting of the Members at which a quorum is present...provided that notice of the intended action is explicit and is included with the materials for the meeting received at least *thirty (30)* days in advance of the meeting”.

These amendments address three issues that have been raised by Board members: (1) the term of office; (2) quorum requirements; and (3) assigning local eligibility decisions for adult participants to a committee for initial review and policy recommendations.

Currently the term of office is fixed at two years. The amendment would extend the term of Board Members until the Mayor appoints a successor. Secondly, the Bylaws are amended to lower the number of Members needed to achieve and maintain a quorum at Board and Committee meetings. Finally, the Bylaws are amended to assign local eligibility decisions for adult participants to committee for initial review and policy recommendations.

RECOMMENDATIONS

Staff recommends the following:

- Current Bylaw Section: 3.6 Term of appointment
  The regular term of appointment of each Member shall be two (2) years, expiring on January 31. However, the initial term for not more than 50% of the Members, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

  Proposed Bylaw Amendment: 3.6 Term of appointment
  The regular term of appointment of each Member shall be two (2) years, expiring on January 31st of every other year or until a successor is appointed by the Mayor, whichever occurs last. However, the initial term for not more than 50% of the Members appointed in February 2005, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

- Current Bylaw Section: 6.4 Quorum
  No enforceable action may be taken at a meeting that lacks a quorum.
  a. Constitution of a quorum

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1. LWIB: At all meetings of the LWIB, presence of fifty percent of the membership shall constitute a quorum, provided that at least half of those present are business representatives.
2. Executive Committee: The presence of a majority of the Members at a meeting of the Executive Committee shall constitute a quorum.

b. Failure to achieve a quorum
When a quorum is not achieved, the LWIB or the Executive Committee may not take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

Proposed Bylaw Amendment: 6.4 Quorum
No enforceable action may be taken at a meeting that lacks a quorum.
a. Constitution of a quorum

1. *LWIB: At all meetings of the LWIB, presence of nineteen (19) Members shall constitute a quorum, provided that at least half of those present are business representatives.*
2. *All Committees: The presence of a majority of the Members at a meeting of each committee shall constitute a quorum.*

b. Failure to achieve a quorum
When a quorum is not achieved, neither the LWIB nor any of its committees may take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

- Current Bylaw Section: 5.3 Program Resources Committee
The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of funding recommendations for programs and services for adult job seekers. This Committee shall develop, approve and recommend design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this committee Chairperson and may include special populations, e.g. refugees, homeless persons.

Proposed Bylaw Amendment: 5.3 Program Resources Committee
The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of policy and funding recommendations for programs and services for adult job seekers. This Committee shall develop and recommend portions of the San Francisco Local Plan for Workforce Investment and Development as required by various federal, state, and local agencies, relating to adult services, including service delivery methods. This Committee shall develop and recommend program plans, eligibility requirements, priority of services, and design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this Committee Chairperson and may include special populations, e.g. refugees, homeless persons.

If you have any questions, please feel free to contact me at (415) 923-4465 or email at pscalloway@picsf.org.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

Research Brief:

San Francisco's Aging Workforce

July 2004

Executive Summary

This report summarizes the impact of workforce aging on the availability of skilled workers in various occupations in San Francisco. It aims to provide local policy-makers and employers with an appreciation of the impact that aging will have on the ability of the city (and specific organizations) to meet its (and their) future workforce needs. The report also provides recommendations for navigating this difficult, yet inevitable, demographic shift.

Summary of Findings

- Older San Franciscans will be the fastest growing age group over the next twenty years and approximately 13% of San Francisco's workforce was 55 or older at the time of the last census – and will reach retirement age by 2010.
- The aging of the workforce will be particularly acute in education and health care:
  - School administrators, elementary, middle school, secondary school, and special education teachers tend to be older than average, and the small number of young teaching assistants will be problematic if not addressed.
  - Advanced health care occupations such as medical service managers, registered nurses, clinical lab techs, and LVNs also have older workforces, but the many young medical assistants and health support techs should provide relief if workers can advance from these more entry-level occupations.
- Workers in information technology and hospitality are relatively young – even in highly skilled occupations – and the abundance of young workers in entry-level jobs should more than fill any openings arising from retirement.
- The office administration, building trades, and social service sectors could experience worker shortages from the near-term retirement of some of their more advanced workers if younger workers in these fields are not recruited and trained to advance.

Workforce Development Policy Responses

1. Young worker attraction, particularly to education and health careers
2. Career advancement encouragement
3. Continued support for immigrant integration

Responses for Individual Employers

1. Characterize the age distribution of your organization's workforce
2. Expand education and internal promotion opportunities for young workers
3. Create an engaging workplace in order to improve recruitment and retention
4. Implement flexible work arrangements to enable older employees to work longer
5. Redefine pension plans to provide incentives for older employees to remain on the job

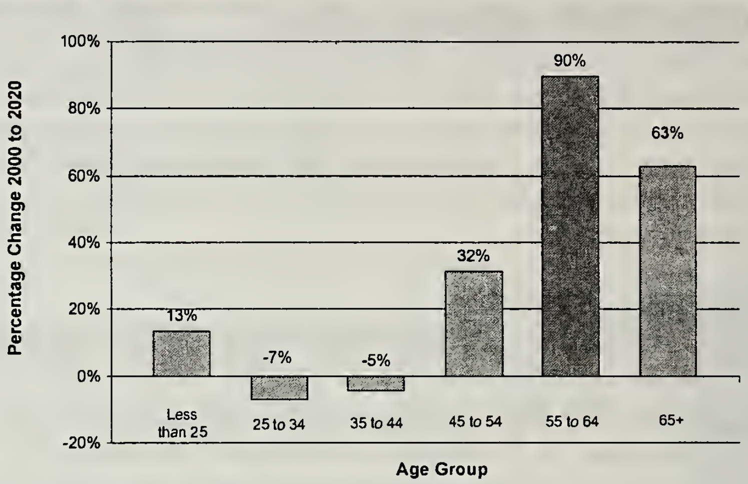
Research Briefs *are released periodically (often quarterly) by WISF to inform the City's workforce and economic development community about short- and long-term developments in San Francisco's economy and labor market. This and other research related to San Francisco's labor market, workforce development system, and economy can be found at http://www.picsf.org/research/research.htm.*

This report was written by Kevin Stange, Labor Market Research Analyst, who can be reached at kevin_stange@yahoo.com.

13% of San Francisco's Workforce in Nearing Retirement Age

It is no secret that the nation's workforce will age substantially over the next two decades as the baby boom generation born between 1946 and 1964 reaches retirement age. In fact, the fastest growing age groups in the Bay Area over the next twenty years will those 55 and older. The Bay Area is not unique: according to the Public Policy Institute of California,[1] this trend reflects the baby boom, migration, and mortality changes affecting all of California and the US.

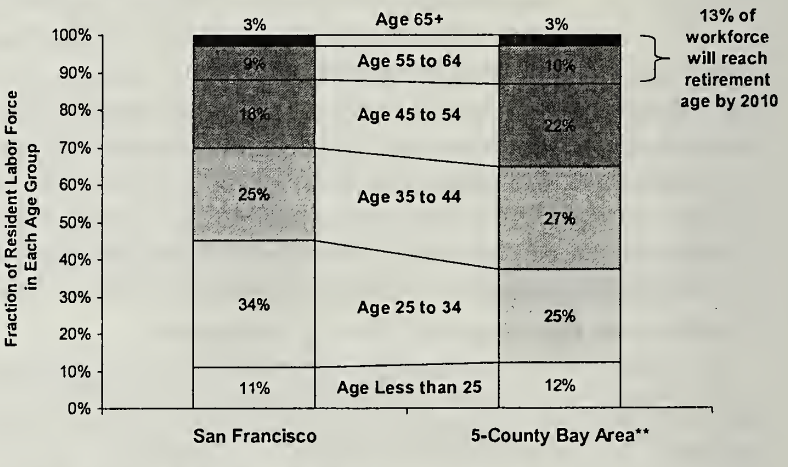
Figure 1: Percentage Change in Population 2000 to 2020
5-County Bay Area*



** Includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.*
SOURCE: Author's calculations from data obtained from California Department of Finance

The effects of this demographic inevitability will be far-reaching. Fewer workers and more retirees will place severe pressure on Social Security finances. The aging population will have greater medical demands, straining states' Medicare budgets and exacerbating an existing shortage of qualified nurses. This report narrowly focuses on one of these specific impacts: the aging of San Francisco's workforce is sure to have a bearing on the availability of trained workers in specific occupations for years to come.

Figure 2: Age Distribution of Resident Labor Force*
2000



** Includes all residents of San Francisco and the Bay Area that are either currently working or actively looking for work*
*** Includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.*
SOURCE: Author's tabulations from the 2000 Census

As shown in Figure 2, 12% of San Francisco's current resident labor force will reach retirement age (65 years old) by 2010. Though the City of San Francisco tends to have more young workers and fewer middle-aged ones, the number of short-term retirees is roughly the same as for the broader 5-county San Francisco Bay Area.[2] At the latest census, 13% of current workers in Alameda, Contra Costa, Marin, San Mateo, and San Francisco counties were at least 55 years old and will reach retirement age by 2010. Replacing this retiring talent pool will not be easy, but one necessary step is to identify the occupations most likely to be impacted by these trends. That is the task undertaken by this report. Readers should couple the information contained herein with evidence on the future demand for specific occupations to form a comprehensive picture of the likely impacts of the aging workforce.

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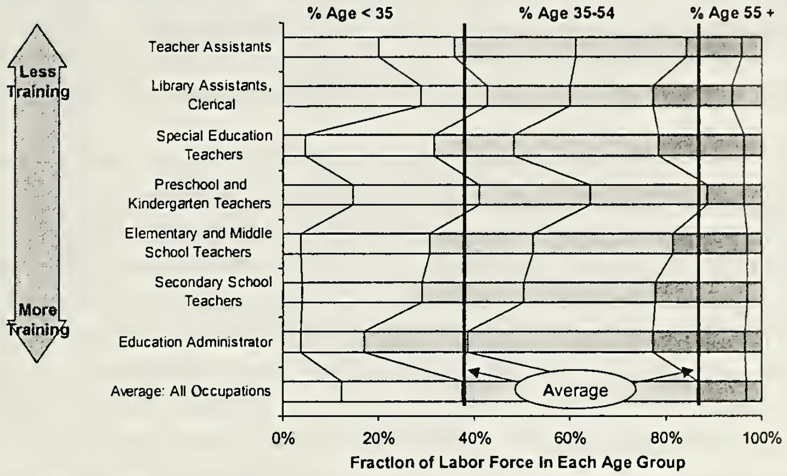
[1] Tafoya, Sonya M. and Hans P. Johnson (2000). "Greying in the Golden State: Demographic and Economic Trends of Older Californians," *California Counts: Population Trends and Profiles*. Volume 2, Number 2. Public Policy Institute of California. San Francisco, CA. November 2000.

Figure 3: Age Distribution of Education Workforce*
5-County Bay Area** Resident Labor Force, 2000

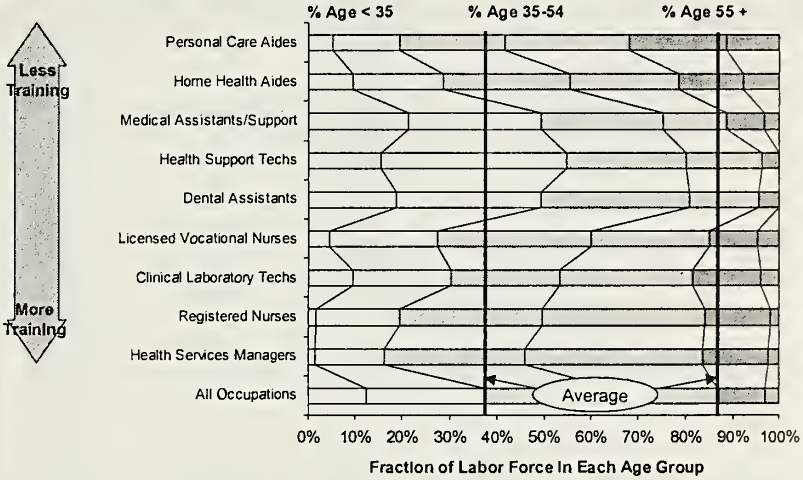


** Includes all residents of San Francisco and the Bay Area that are either currently working or actively looking for work*
*** Includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.*
SOURCE: Author's tabulations from the 2000 Census

Education and Health Care

Much attention has been paid nationally to the aging of workers in the Education and Health fields and census evidence suggests that this is an important issue for the San Francisco Bay Area as well.

Figure 4: Age Distribution of Health Care Workforce*
5-County Bay Area** Resident Labor Force, 2000



** Includes all residents of San Francisco and the Bay Area that are either currently working or actively looking for work*
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SOURCE: Author's tabulations from the 2000 Census

Figure 3 displays the age distribution of various occupations in San Francisco's Education sector.[3] With few exceptions, workers in almost all education-related occupations tend to be older than average. More than twenty percent of education administrators and elementary and secondary school teachers will reach retirement age by 2010 and many more will shortly thereafter.

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[2] Since the City of San Francisco draws nearly half its daily workforce from these surrounding communities, the remainder of this report utilizes this broader 5-county view of San Francisco's workforce.

[3] Each horizontal bar in Figures 3 through 9 provides a visual depiction of the age distribution in the 5-county Bay Area for a specific occupation. The lightest (leftmost) color represents the fraction of workers in the given occupation that are less than 35 years old, the medium-colored section represents the fraction between 35 and 54 years old, and the darkest (rightmost) is the fraction of workers 55 years or older. The bottom bar on each graph is the average age distribution for all occupations in the 5-county area and the dark vertical lines indicate the average split between the three age categories for all occupations. "Younger" occupations are shifted to the right of these vertical lines, whereas "older" occupations are shifted to the left. The occupations are also roughly arranged from least skilled (top) to most skilled (bottom) within each

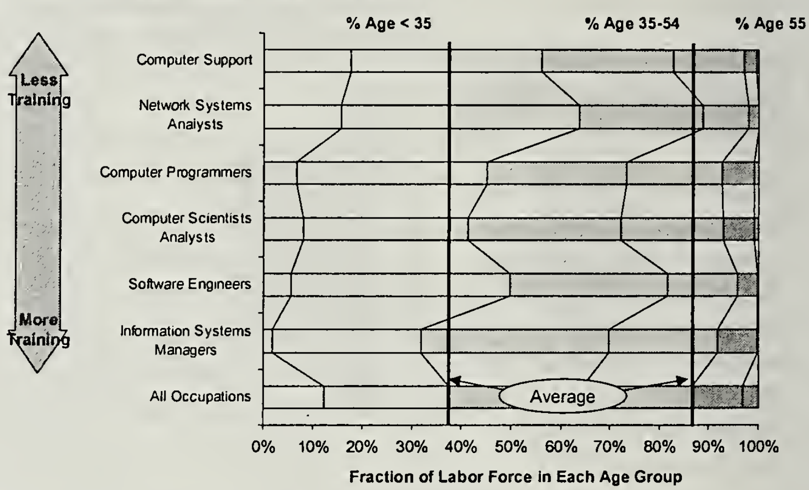
Most worrisome, entry-level educators such as teaching assistants and library assistants are not much younger than average. Without an adequate supply of young educators in the pipeline, school districts will have difficulty filling the openings arising from baby boom retirees. Advancing current teaching assistants to full-time teachers is necessary but not enough – recruiting new young educators is also critical.

A slightly different picture emerges for the Health Care sector, as shown in Figure 4. Like education, many highly skilled and experienced health care workers – such as health service managers, registered nurses, clinical laboratory technicians, and licensed vocational nurses – are older than average and many are nearing retirement. Unlike in education, however, entry-level health occupations appear to have many young workers. Medical assistants, health support technicians, and dental assistants tend to be quite a bit younger than average. Promoting the advancement of entry-level health care workers to more highly-skilled jobs should be one major response of San Francisco's workforce policy to the aging of its health care workforce.

Information Technology and Hospitality: Young and Staying Young

In contrast to Education and Health Care, San Francisco's Information Technology and Hospitality sectors are young throughout the occupational pipeline. Only the most senior positions – IT department managers and hotel managers – have age structures that are not younger than average. A strong pipeline of younger workers should mitigate any direct effects of workforce aging on these two sectors.

Figure 5: Age Distribution of IT Workforce*
5-County Bay Area** Resident Labor Force, 2000



** Includes all residents of San Francisco and the Bay Area that are either currently working or actively looking for work*
*** Includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.*
SOURCE: Author's tabulations from the 2000 Census

Information Technology is San Francisco's newest major employment sector. Its emergence over the past decade – especially during the boom of the late 1990's – attracted younger, more technology-savvy workers than other sectors. Young workers were drawn to the industry's rejection of traditional office formality, and by the high price paid for their newly minted computer skills. Many recent high school and college graduates over the past ten years found work in computer support, network administration, programming, and software engineering. As a result of this youth influx, these occupations will likely remain much younger than average. In fact, only 8% of IT

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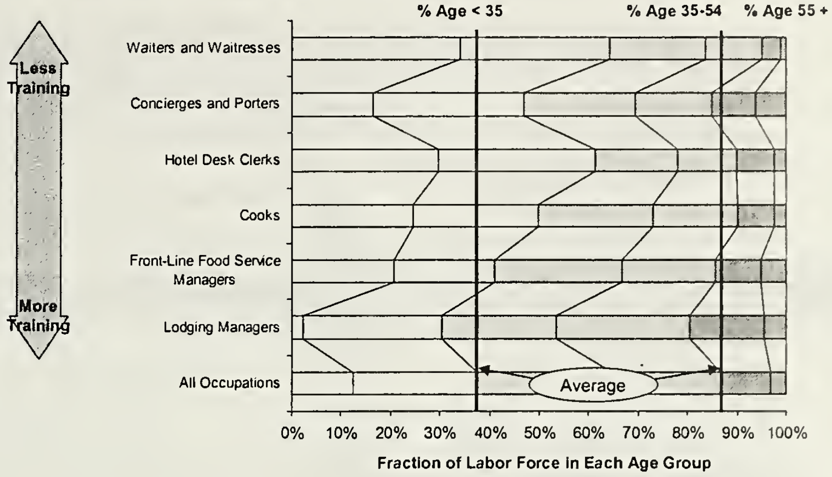
broad sector, and thus represent potential steps in a career ladder within a sector. By looking across all these occupations, a sector can assess the adequacy of its workforce "pipeline."

managers are approaching retirement age; most are between the ages of 35 and 54. Consequently, the IT sector will remain relatively immune from the direct effects of workforce aging, at least for the foreseeable future.

Figure 6: Age Distribution of Hospitality Workforce*
5-County Bay Area** Resident Labor Force, 2000



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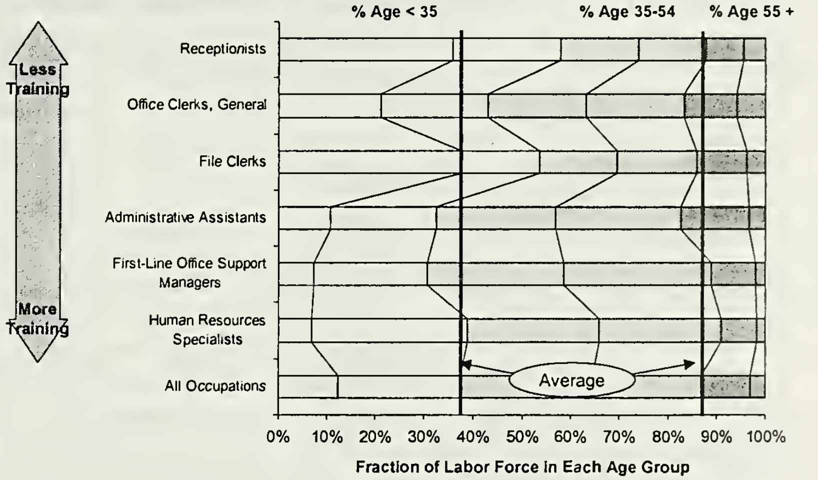
SOURCE: Author's tabulations from the 2000 Census

The culture and work environment of the Hospitality industry also tends to attract younger workers. Only hotel managers are older than average – about 20% will reach retirement age by 2010. Food service managers, desk clerks, and concierges are all younger than average, providing ample talent for future hospitality management positions if employer-provided training provides workers with the skills needed to advance.

Office Administration: Many Young Workers Seeking Advancement

San Francisco's general office administration sector should also be able to weather the impending retirement boom if entry-level workers' advancement is made a priority. Office managers and administrative assistants tend to be slightly older than average but the steady flow of young workers into receptionist, office clerk, and file clerk positions should replenish retirees if these young workers can be retained, trained, and advanced to more highly skilled positions.

Figure 7: Age Distribution of Office Administration Workforce*
5-County Bay Area** Resident Labor Force, 2000



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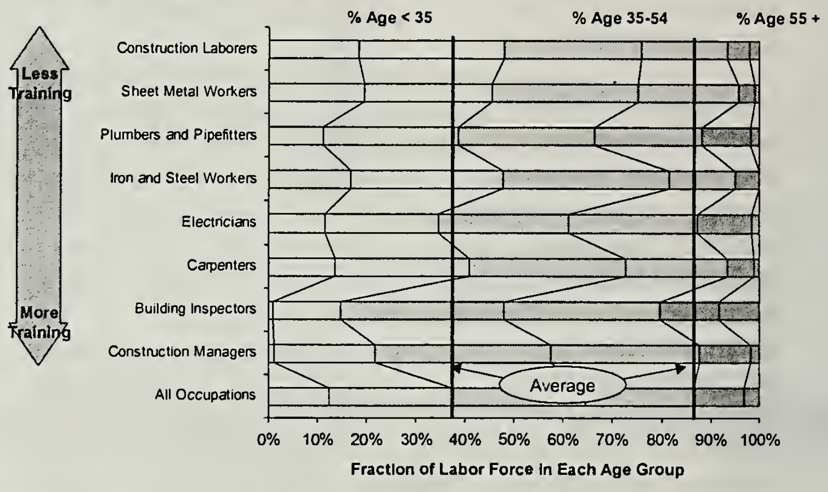
SOURCE: Author's tabulations from the 2000 Census

Building Trades: Robust Pipeline, but Closer Look Needed

Most of the building trades have the same approximate age distribution as the Bay Area average, indicating a fairly retirement-robust workforce. Future needs for building inspectors and construction managers, for instance, could probably be met from existing tradesmen ranks. Unfortunately, this analysis masks differences across experience levels for a given occupation. That is, journey-level carpenters are treated the same as apprentice carpenters. To fully understand the age profiles of jobs with significant within- rather than across-occupation advancement (such as most trades), a closer look is needed. Trades must ensure a balanced age distribution between journey and apprentice-level workers, which this present analysis does not shed light on.

Figure 8: Age Distribution of Building Trades Workforce*
5-County Bay Area** Resident Labor Force, 2000



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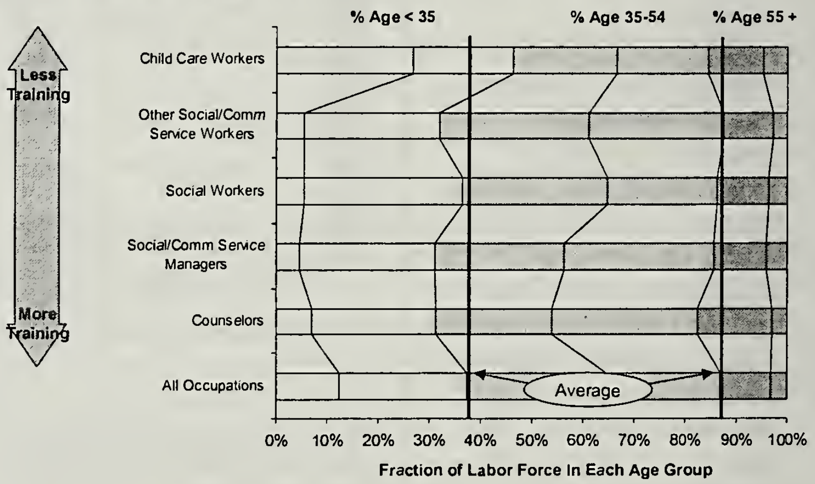
SOURCE: Author's tabulations from the 2000 Census

Government, Social and Community Service Occupations

Workforce aging is of particular concern to large public-sector employers. Researchers at the Rockefeller Institute of Government note that government workforces tend to be older than the private sector and that the age gap between public and private sectors has been widening.[4] Locally, a recent report by the San Francisco Department of Human Resources notes that 60% of city managers will reach retirement age by 2013, doubling the

Figure 9: Age Distribution of Social & Community Service Workforce*
5-County Bay Area** Resident Labor Force, 2000



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*** Includes Alameda, Contra Costa, Marin, San Francisco, and San Mateo counties.*
SOURCE: Author's tabulations from the 2000 Census

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[4] Abbey, Craig W. and Donald J. Boyd (2002). "The Aging Government Workforce," The Nelson A. Rockefeller Institute of Government. July 2002. Available at www.rockinst.org.

retirement rate of the past.[5]

The San Francisco Department of Human Services (DHS) provides a stark example: though social workers and social service managers in the Bay Area tend to be only slightly older than the average (see Figure 9) for all occupations, DHS' workforce is much older than average. According to DHS, more than 26% of its workforce is at least 55 years old (vs. 13% for all occupations) and only 12% are less than 35 years old (vs. 38% on average). Though the aging of the social service workforce is somewhat challenging for the city overall, the problem is particularly acute for the city's largest social service employer: local government.

Addressing the Aging of San Francisco's Workforce

Workforce Development Policy Responses

This report has highlighted several important workforce policy responses to the well-known demographic shifts that lie ahead:

1. **Attract** younger workers to careers in education and health care, and to San Francisco generally.
2. **Promote career advancement** training, particularly for educators, health care workers, and select hospitality, office, and social service workers. The continued apprentice-to-journeyperson advancement of building trades workers should also be encouraged.
3. **Continue support for immigrant integration.** A recent report by the Public Policy Institute of California noted, "much of tomorrow's workforce are today's second generation children of immigrants."[6] The city's success at integrating recent immigrants into the community will have a profound effect on the strength of tomorrow's workforce through this channel.

Responses for Individual Employers

Though local policy makers can ensure that an aggregate qualified pool of workers exists for important occupations, individual employers must also manage the age structure of their internal workforce and plan for dealing with changes in that structure. Perhaps because they were the first to face the effects of an aging workforce, public employers have been the most actively innovating ways to retain and extend the careers of older workers, according to a recent report by the U.S. General Accounting Office.[7] Several strategies individual organizations have employed include:

1. **Characterize the age distribution of your organization's workforce.** The DHS example illustrates that internal, organization-specific succession planning issues can differ dramatically from aggregate, city-wide ones.
2. **Expand education and internal promotion opportunities** for young workers.
3. **Create an engaging workplace** in order to improve recruitment and retention.
4. **Implement flexible work arrangements** such as part-time, seasonal, or contract work, reduced job responsibilities, and job sharing to enable older employees to work longer.
5. **Redefine pension plans** – Deferred Retirement Options Plans (DROPs) are one example – to provide incentives for older employees to remain on the job past typical retirement age.

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[5] McGuinness, Michael, Robert Pritchard, and Herberth Campos (2003). "Who Will Do San Francisco's Work?: Managing Workforce Change," San Francisco Department of Human Resources. June 2003.

[6] Johnson, Hans P. (2003). "California's Demographic Future." Public Policy Institute of California Occasional Papers. San Francisco, CA. December 2003.

[7] U.S. General Accounting Office (2001). "Older Workers: Demographic Trends Pose Challenges for Employers and Workers." GAO Report GAO-02-85. November 2001.

Information Technology Consortium

Delivering Digital Diversity

ITC's History

- Capitalize on 'dot com' boom in SF and Bay Area
- Respond to welfare reform / bridge the "digital divide"
- Develop career ladder for training and advancement
- Unprecedented collaboration for non-profits

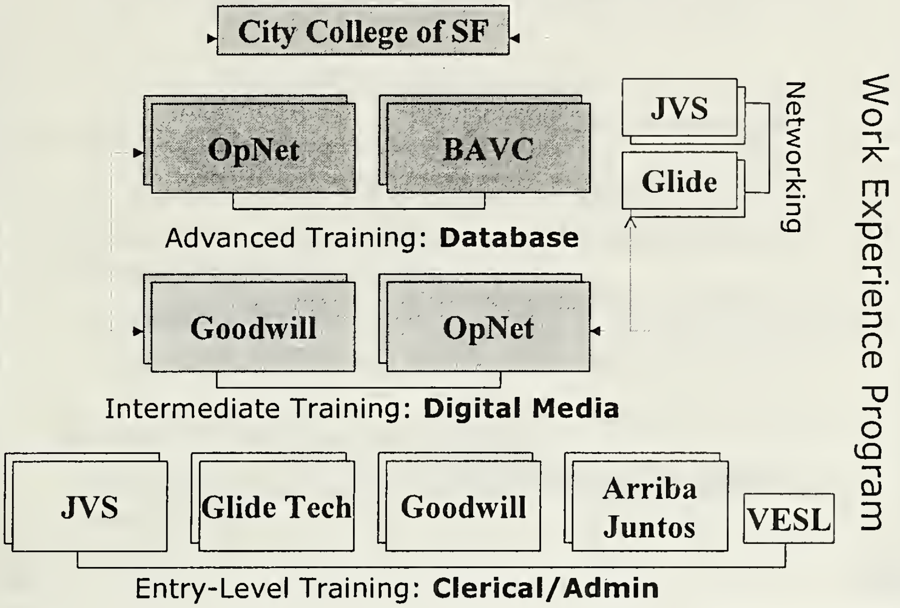
ITC Partners

- Arriba Juntos
- BAVC
- City College of San Francisco
- Glide Foundation
- Goodwill Industries
- JVS
- OpNet Community Ventures
- SFDHS
- SFHA

Funding Responses

- James E. Irvine Foundation
- Walter and Elise Haas Fund
- CA State Legislature
- DoL H-1B Grants
- WIA Governor's 15% Fund
- Jobs for the Future

ITC Career Ladder



City College of SF

OpNet

BAVC

Advanced Training: **Database**

Goodwill

OpNet

Intermediate Training: **Digital Media**

JVS

Glide Tech

Goodwill

Arriba Juntos

VESL

Entry-Level Training: **Clerical/Admin**

JVS

Glide

Networking

Work Experience Program

Bay Area Economic Changes

- 'Dot com bust'
- Since 2001, San Francisco has lost 55,000-60,000 jobs (*Source: SFCED*)
- Unemployment:
  2001 – 5.2%; 2002 – 7.4%; 2003 – 6.8%; 2004 – 5.9% (*Source: EDD*)
- Slow economic recovery
- Over-supply of highly skilled tech workers
- Outsourcing/offshoring
- Shifts in technical and professional skills requirements

ITC's Response

- Multi-sector approach
- Build and rebuild employer relationships
- Showcase ROI for employers (low-cost resource)
- Re-align Career Ladder
- Highlight new skills in curriculum
- Align courses w/CCSF
- Address dual customer

Employer Engagement

ITC's Employer Partners
(partial list)

- Adecco
- Bowne Business Solutions
- Kaiser Permanente
- Office Team
- Oracle
- Wells Fargo
- SBC
- Allied Security
- PG&E
- Robert Half International
- Single Point of Contact
- Time Warner
- UCSF
- Genentech
- Pearson Education

Employer Engagement

Three-Pronged Approach

- Initial Outreach
  - To educate, inform and engage employers
- Training Relevancy Audit
  - To solicit market-relevant information regarding appropriate training programs
- Participant Assistance Activities
  - To provide direct employer feedback regarding interviewing, resumes, etc.

Employer Engagement

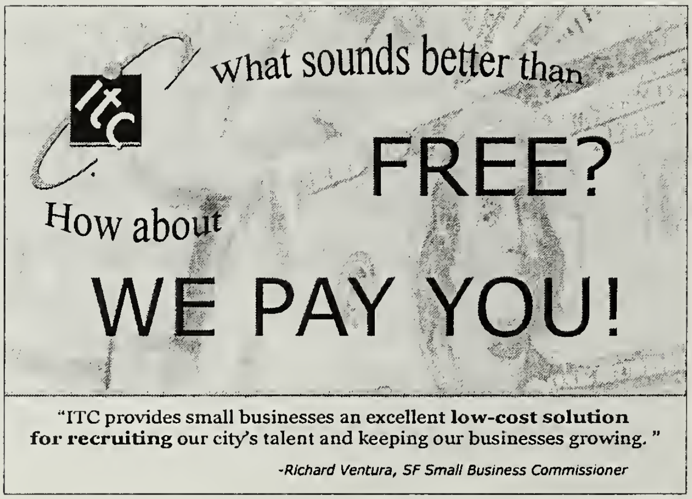
- Corporate Advisory Councils
  - Office Technologies
  - Advanced Technologies
- Employer Insight Panels
- Aggressive Outreach Activities

Employer Outreach

- Website re-launch
- Press outreach
- Presentations at Chambers of Commerce and Industry Associations:
  - SBA, Small Business Network, SBDC
  - SF Chamber of Commerce, Hispanic Chamber of Commerce
  - National Association of Women Business Owners
  - Local merchant associations
  - Non-profit conferences, Human Resource conferences
  - Direct outreach for available opportunities, On-site visits
  - SFCED partnership, Recruitment firm partnerships

Employer Outreach

Direct mail piece to small businesses



"ITC provides small businesses an excellent **low-cost solution** for **recruiting** our city's talent and keeping our businesses growing."

-Richard Ventura, SF Small Business Commissioner

Employer Engagement

Why Participate in the ITC?

- Streamlined, efficient low-cost recruitment source
- Candidate pre-screening
- Timely, responsive & flexible resource
- Corporate citizenship
- Customized training opportunities
- Low-cost retention services
- Internships
- Assistance with diversity recruitment efforts

Employer Engagement

"ITC provides an invaluable service to Single Point of Contact staffing requirements. Their knowledgeable and professional staff have been a huge add value on locating the right people for our clients needs."

Fernando Leon
Vice President of Sales and Marketing
Single Point of Contact

"With the help of SFITC I was able to find a job as the technical support person at Swords to Plowshares. Now that I am working, I can start building up my skill level. SFITC has provided me with the tools and skills that I need to succeed in life."

Mike Dang
Successful ITC Graduate

Successes

Trained through ITC partnership	760 +
Placement	300 +
Current number of OJTs	48
Range of OJT wages per hour	$9.50 - $80.00
Median wage:	$15.00
Generated OJT income to SF economy	$500,000

Workforce Intermediary Activities

- Incumbent Worker Training – SF Department of Public Health
  - 800 CNAs, LVNs and other non-licensed nursing personnel receive IT training
  - IT integrated in healthcare curriculum at CCSF
- Training, Inc. National Affiliate (in progress)
  - Model program providing workplace simulation experience
- Genentech Training
  - Collaboration between partner agencies, employer and staffing agencies

Challenges

- Continued economic slump in Bay Area
- Outsourcing/Offshoring
- Competition w/highly skilled dislocated IT workers
- Scarce funding resources
- Skeptical private sector
- Competing outlets (recruitment firms, etc.)
- Dual – customer approach
- Professional skills gap

Opportunities

- Strength as a workforce intermediary
  (best practices; established relationships)
- Entry-level Window of Opportunity
- Linkage with SF's economic/workforce development activities
- WIB support for increasing capacity of ITC as workforce intermediary
- Collaboration
- City College partnership

ITC Contact Information

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Executive Director

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San Francisco, CA 94103

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WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD MEMBERS **DATE:** SEPTEMBER 20, 2004

FROM: PAMELA S. CALLOWAY, CHIEF OF STAFF

SUBJECT: STAFF RECOMMENDATIONS: PROPOSED BY-LAW AMENDMENTS (AGENDA ITEM 5)

ACTION REQUESTED

The WISF Board is asked to adopt amendments to the Bylaws. These amendments will be considered at the scheduled October 20th meeting.

BACKGROUND

WISF Board Bylaws provide that "the Bylaws may be amended at any meeting of the Members at which a quorum is present...provided that notice of the intended action is explicit and is included with the materials for the meeting received at least *thirty (30)* days in advance of the meeting".

These amendments address three issues that have been raised by Board members: (1) the term of office; (2) quorum requirements; and (3) assigning local eligibility decisions for adult participants to a committee for initial review and policy recommendations.

Currently the term of office is fixed at two years. The amendment would extend the term of Board Members until the Mayor appoints a successor. Secondly, the Bylaws are amended to lower the number of Members needed to achieve and maintain a quorum at Board and Committee meetings. Finally, the Bylaws are amended to assign local eligibility decisions for adult participants to committee for initial review and policy recommendations.

RECOMMENDATIONS

Staff recommends the following:

- Current Bylaw Section: 3.6 Term of appointment
  The regular term of appointment of each Member shall be two (2) years, expiring on January 31. However, the initial term for not more than 50% of the Members, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

  Proposed Bylaw Amendment: 3.6 Term of appointment
  The regular term of appointment of each Member shall be two (2) years, expiring on January 31st of every other year or until a successor is appointed by the Mayor, whichever occurs last. However, the initial term for not more than 50% of the Members appointed in February 2005, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

- Current Bylaw Section: 6.4 Quorum
  No enforceable action may be taken at a meeting that lacks a quorum.

a. Constitution of a quorum
   1. LWIB: At all meetings of the LWIB, presence of fifty percent of the membership shall constitute a quorum, provided that at least half of those present are business representatives.
   2. Executive Committee: The presence of a majority of the Members at a meeting of the Executive Committee shall constitute a quorum.

b. Failure to achieve a quorum
When a quorum is not achieved, the LWIB or the Executive Committee may not take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

Proposed Bylaw Amendment: 6.4 Quorum
No enforceable action may be taken at a meeting that lacks a quorum.
a. Constitution of a quorum
   1. LWIB: At all meetings of the LWIB, presence of nineteen (19) Members shall constitute a quorum, provided that at least half of those present are business representatives.
   2. All Committees: The presence of a majority of the Members at a meeting of each committee shall constitute a quorum.

b. Failure to achieve a quorum
When a quorum is not achieved, neither the LWIB nor any of its committees may take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

- Current Bylaw Section: 5.3 Program Resources Committee
  The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of funding recommendations for programs and services for adult job seekers. This Committee shall develop, approve and recommend design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this committee Chairperson and may include special populations, e.g. refugees, homeless persons.

  Proposed Bylaw Amendment: 5.3 Program Resources Committee
  The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of policy and funding recommendations for programs and services for adult job seekers. This Committee shall develop and recommend portions of the San Francisco Local Plan for Workforce Investment and Development as required by various federal, state, and local agencies, relating to adult services, including service delivery methods. This Committee shall develop and recommend program plans, eligibility requirements, priority of services, and design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this Committee Chairperson and may include special populations, e.g. refugees, homeless persons.

If you have any questions, please feel free to contact me at (415) 923-4465 or email at pscalloway@picsf.org.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** SEPTEMBER 15, 2004

FROM: LESLIE LUTTGENS, VICE CHAIR OF EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATIONS FOR YEAR NINE OF THE HOMELESS EMPLOYMENT COLLABORATIVE (HEC) (AGENDA ITEM 6A)

ACTION REQUESTED

The WISF Board is asked to ratify an expenditure plan for Year Nine of the HEC.

BACKGROUND

In July of 2003, the City and County of San Francisco submitted an application to the U.S. Department of Housing and Urban Development (HUD) for $1,060,899 to renew funding for the Homeless Employment Collaborative (HEC). The one-year renewal period is from October 1, 2004 to September 30, 2005 for Year Nine of HEC funding. In July 2004, HUD notified the San Francisco Department of Human Services (SFDHS) of final selection of the HEC project for a one-year renewal grant, at the same level of funding, with the PIC as sponsor under HUD's Supportive Housing Program.

RECOMMENDATION

The Executive Committee recommends funding, at the same funding level, the ten community-based organizations that have been HEC subcontractors in Year Eight. The community organizations have been working together as a collaborative from 1996 to the present to develop a comprehensive and integrated employment and training system for the homeless population of San Francisco. The City, in consort with the PIC staff, named these subcontractors in the application to HUD for renewal of the program. HUD awarded no additional funds to the current funding level for Year Nine. Attached for your review are recommended subcontractor funding levels for Year Nine of HEC (Attachment 1), the current HEC performance summary data and individual subcontractor actual verses planned data in Year Eight (Attachment 2), and the previous seven-year program results (Attachment 3).

Staff will be at your October 20th meeting to answer any questions you may have.

Attachments

Attachment 1

Homeless Employment Collaborative Current Budget for Year Eight and Recommended Funding Levels for Year Nine

HEC Subcontractors		$843,770	(79.5%)
Arriba Juntos	$148,261		
Catholic Charities	$24,651		
Central City Hospitality House	$69,569		
Community Housing Partnership	$102,974		
Episcopal Community Services	$143,935		
Goodwill Industries	$47,326		
Mission Hiring Hall	$72,225		
No. California Service League	$112,050		
Swords to Plowshares	$78,019		
Toolworks Inc.	$44,760		
HEC Participant Support		$66,326	(6.3%)
DHS Administration		$25,260	(2.4%)
PIC Administration		$25,260	(2.4%)
PIC Personnel Costs		$98,005	(9.2%)
PIC Operating Costs		$2,278	(0.2%)
Total:		**$1,060,899**	**(100%)**

8/31/04

Attachment 2

THIRD QUARTER SERVICE AND OUTCOME STATISTICS
HOMELESS EMPLOYMENT COLLABORATIVE (HEC)
OCTOBER 1, 2003 – JUNE 30, 2004

Enrollments	371
Terminations	183
Placements	128
Other Positive Terminations	33

Placement Rate	70%
Positive Termination Rate	88%
Ninety Day Retention Rate	N/A

Average hours per week at placement	28.71
Average wage per hour at placement	$10.16
Full Time Employment	48%
Part Time Employment	29%
Transitional Employment	23%

HEC INDIVIDUAL AGENCY PERFORMANCE SUMMARY
ACTUAL VERSES PLANNED NINE-MONTH GOALS
OCTOBER 1, 2003 - JUNE 30, 2004

Subcontractor	Percent of Plan*
Arriba Juntos	59%
Catholic Charities	117%
Central City Hospitality House	81%
Community Housing Partnership	101%
Episcopal Community Services	54%
Goodwill Industries	70%
Mission Hiring Hall	122%
No. California Service League	96%
Swords to Plowshares	59%
Toolworks Inc.	80%

* Percent of Plan includes total actual enrollment, placement, and other positive outcomes versus total planned enrollment, placement, and other positive outcomes.

8/31/04

Attachment 3

THE SAN FRANCISCO HOMELESS EMPLOYMENT COLLABORATIVE
SEVEN-YEAR PROGRAM PERFORMANCE
OCTOBER 1, 1996 to SEPTEMBER 30, 2003

	Year One	**Year Two**	**Year Three**	**Year Four**	**Year Five**	**Year Six**	**Year Seven**
Time Period	10/1/96-9/30/97	10/1/97-9/30/98	10/1/98-9/30/99	10/1/99-9/30/00	10/1/00-9/30/01	10/1/01-9/30/02	10/1/02-9/30-03
Enrolled in Training	393	438	461	409	469	467	531
Job Placements	169	168	175	187	199	223	254
Job Placement Rate	43%	38%	38%	46%	42%	48%	48%
Ninety Day Job Retention Rate	75%	71%	64%	79%	69%	62%	68%
Average Wage at Placement	$7.92/hr	$8.53/hr	$8.72/hr	$9.70/hr	$10.66/hr	$11.25/hr	$10.74
Average Hours per Week at Placement	31.91	32.29	33.67	34.27	34.58	33.31	31.06
Total Expenditures	$721,923	$833,044	$1,150,797	$971,639	$985,868	$1,047,247	$1,074,339
Cost per Service	$1,837	$1,902	$2,496	$2,376	$2,102	$2,242	$2,023
Cost per Job Placement	$4,272	$4,959	$6,576	$5,196	$4,954	$4,696	$4230

Summary of Seven-Year Period:

Total enrolled in training	3,168	(100%)	Total program expenditures	$6,784,857
Total job placements	1,375	(43%)	Cost per person served	$2,142
Total ninety day job retentions	954	(69%)	Cost per job placement	$4,934

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** AUGUST 11, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: ACCEPTANCE OF COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) FUNDS TO OPERATE THE TAX CREDIT VOUCHERING PROJECT IN PY 2004 (Agenda Item 6B)

ACTION REQUESTED

The WISF Board is asked to ratify the acceptance of 2004 CDBG in the amount of $70,000 to operate the Tax Credit Vouchering Project.

BACKGROUND

The Private Industry Council of San Francisco, Inc. has been receiving CDBG funds from the Mayors Office of Community Development since 1998 to operate the Tax Credit Vouchering Project.

This project is designed to provide employers with ease of access and technical assistance on various hiring tax credits available to San Francisco employers. The project provides a single point-of-contact through the Tax Credit hotline and website. It also serves as the portal for the City's sfbizinfo users to access tax credits and other workforce related information.

The PIC, Inc. issued over 12,000 tax credit vouchers from 1999 - 2003. This translates to over 12,000 jobs were filled by economically disadvantaged individuals as a result of the tax credits. Due to a number of unknown variables (eg. length of employment, hourly wage, etc.), it is difficult to determine the amount of tax credits San Francisco businesses received from the State during this period. If one uses the assumption that all of the 12,000 employees only worked for six months, and that they were paid the minimum wage, it is estimated that the total tax credit amounts to no less than 44 million dollars.

RECOMMENDATION

Without a doubt, this project is vital to the City's economic and workforce development efforts. Executive Committee recommends that the WISF Board ratify the acceptance of this grant, so that businesses and job seekers may continue to receive this valuable service.

Staff will be present at your October 20th meeting. If you have any questions prior to the meeting, please call Lucia Hughes 415-861-4002.

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Telephone 415.43[illegible] • Fax [illegible]
TDD 800.735.2929 or RS[illegible]

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** AUGUST 11, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATION TO RATIFY JEWISH HOME FOR THE AGED CUSTOMIZED TRAINING PROPOSAL TO OPERATE A CERTIFIED NURSING ASSISTANT TRAINING PROGRAM (Agenda Item 6C)

ACTION REQUESTED

The WISF Board is asked to approve the Customized Training proposal of Jewish Home for the Aged (JHA) to operate a Certified Nursing Assistant (CNA) training program. The total cost of the training is proposed at $224,679, and JHA is requesting funding in the amount of $112,339 to train 30 new hires.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training is targeted for unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Board. The employer is required to cover at least 50% of the training cost and hire or retain those successfully complete the training.

On June 15, 2004 JHA and Jewish Vocational Services (JVS) jointly submitted a proposal to PIC for funding of a Customized Training project.

On June 23, 2004, staff presented the JVS/ JHA proposal at the Employer Services Committee meeting. Committee members reviewed the JHA customized training proposal for possible funding recommendation. At the time of the meeting, the proposed cost of the entire program was $240,000 and funding requested was $120,000. The project intends to train 30 individuals to become Certified Nursing Assistants. The proposed program design identified JVS as the provider of recruitment, case management, retention and placement services. JVS will also provide the job readiness skills training. Upon completion of the job readiness skills training, the participants will receive clinical skills training provided by JHA, the employer.

Due to the complexity of the program design and lack of detail on the program budget, committee members questioned the cost of the entire project, and evidence that the employer pays for at least half of the identified allowed training costs. Since the employer was not present at the meeting, and the training provider representatives from JVS did not have additional information to provide at that time, committee members made a consensus to approve the proposal for funding contingent on (1) 2003-2004 dollars be used to fund this project, (2) that the proponents provide staff with additional cost detail, which shows the

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TDD 800.735.2929 (CRS)

employer's share of allowable customized training cost, and (3) support the project in an amount not to exceed $120,000.

On June 30, 2004, JVS provided staff with a one-page budget sheet outlining the training provider's and the employer's cost of each training related expense. The budget sheet indicated a slight reduction in the total cost of training and hence a reduction in the funding request from $120,000 to $112,339. Since the budget did not identify the breakdown of specific services, staff was reluctant to proceed with any recommendations until further clarifications from the proponents.

On July 14, 2004, staff met with JVS representatives to further discuss the JHA/JVS proposal. JVS representatives identified their portion of the services as recruitment and outreach, assessment, case management, job development, placement and job readiness training services. They identified the employer as the training provider of clinical skills and classroom training. It seems to staff that the services being provided by JVS fall into the realm of WIA Core and Intensive services, and the training services provided by JHA qualify as Customized Training services. Nevertheless, staff did not have enough information to make an informed funding recommendation, due to (1) the budget information did not provide a breakdown of cost of each service component, and (2) the budget did not specify the source of funds being used on the employer's behalf, as staff was advised that the employer will not providing the 50% match out of its own pocket. Staff advised JVS representatives to provide the additional information as soon as possible, so that staff can make recommendations to the Executive Committee on August 11, 2004.

On August 3, 2004, JVS provided staff with the requested budget information, including staff salary detail and breakdown of training costs versus those associated with the Core and Intensive (wrap-around) services.

FINDINGS

Based on staff's review of the proposal, staff made three significant findings that are inconsistent with the intent of the Customized Training policy and current practices:

(1) Allowable Customized Training Activities

The services being provided by JVS, namely recruitment, outreach, assessment, job readiness training, case management and placement are considered to be WIA Core and Intensive services as defined in Section 134 (d) and Section 134 (d)(3) of the Workforce Investment Act. Thus, these services are not considered to be reimbursable customized training activities or costs.

(2) Allowable Customized Training Cost

As indicated on the budget provided by JVS, the JHA portion of the cost consists of $22,500 for space in addition to the allowable instructional cost, training materials and training fees. Staff strongly believes that Customized Training funds should not be used for cost that would be incurred by the employer in the normal course of conducting business should the customized training not occur. In other word, Customized Training funds will only be used to pay new cost generated by undertaking the Customized Training activities. Since the employer owns the building in which the training will take place, Customized Training funds should not be used to pay for the usage of the space, as it is a cost that would be incurred by the employer in the normal course of doing business.

(3) Commitment of the Employer
As indicated on the proposal, participants will be hired as employees of JHA at the start of the training, and they will be paid $12.40 per hour in wages during the training period. JHA proposed to retain at least 20 successful completers of the program. Pursuant to the Customized Training policy #1, "Employer shall make a good faith effort to hire or advance trainee upon successful completion of training." Staff feels that the employer should make good faith effort to retain all those that successfully complete the training.

RECOMMENDATIONS

(1) The Executive Committee recommends funding the Training services portion of the project in the amount of **$72,304.50** using the unobligated 2003-2004 Customized Training funds. This amount covers all the training services that will be provided by JVS and JHA except the $22,000 cost of JHA space, and

(2) Funding the Core and Intensive services (also referenced by JVS as Support Services on the Customized Training Proposal Budget) portion of the project in the amount of **$28,785.50** using carry-over 2003-2004 WIA Adult Title I funds originally set-aside for Customized Training consistent with the PIC WIA Adult solicitation conducted in April 2003.

(3) Require the employer to make good faith effort in retaining all successful completers of the training.

Staff will be available at the meeting to answer any questions you may have. If you have any questions prior to the meeting, please contact Robert Schwab at 431-8700.

Attachments

JVS-Jewish Home Customized Training Proposal Budget

	Training Services	*Support Services*	*Combined*
JVS Salaries			
Program Coordinator/Job Readiness Instructor	19,987	19,987	39,974
Director of Training	3,290	3,290	6,580
Program Assistant	-	3,534	3,534
Outreach Coordinator	-	4,356	4,356
Employer Services Manager	-	3,000	3,000
Fringe at 25.65%	5,971	8,764	14,734
Total JVS Salaries	**29,248**	**42,931**	**72,178**
Jewish Home Salaries			
Director of Nursing	6,800	-	6,800
Nursing Instructor	30,000	-	30,000
Clinical Supervisors	16,400	-	16,400
Accounting and Administration	2,600	-	2,600
Fringe at 31.7%	17,700	-	17,700
Total Jewish Home Salaries	**73,500**	**-**	**73,500**
JVS Other Direct Expenses			
Program Supplies	3,000	-	3,000
Staff Travel	270	270	540
Client Outreach	-	600	600
Rent	3,387	4,971	8,358
Office Supplies, including Computer Supplies	498	730	1,228
Reproduction	239	351	590
Telephone	227	333	560
Postage & Delivery	81	119	200
Total JVS Other Direct Expenses	**7,701**	**7,374**	**15,076**
Jewish Home Other Direct Expenses			
Fingerprinting	600	-	600
Physical	1,800	-	1,800
TB screening	900	-	900
DHS application	1,410	-	1,410
American Red Cross	2,550	-	2,550
Textbooks	1,350	-	1,350
Reference checks	450	-	450
Other program supplies	600	-	600
Space	22,500	-	22,500
Total Jewish Home Other Direct Expenses	**32,160**	**-**	**32,160**
JVS Administrative Costs	**5,481**	**7,265**	**12,746**
Jewish Home Administrative Costs	**19,019**	**-**	**19,019**
Total JVS Costs	**42,430**	**57,571**	**100,000**
Total Jewish Home Costs	**124,679**	**-**	**124,679**
Total Program Costs	**167,109**	**57,571**	**224,679**

PRIVATE INDUSTRY COUNCIL
of San Francisco, Inc.
creating
employment
opportunities

CUSTOMIZED TRAINING PROPOSAL

I. EMPLOYER INFORMATION (*To be completed by Employer*):

Company: Jewish Home
Telephone #: 415/469-2210
Address: 302 Silver Avenue
San Francisco, CA 94112
Training Site Address (If Different):

Name & Title of Contact Person: Sandra Simon, Administrator
Individual(s) Authorized to Sign Invoices: Sandra Simon, Administrator
Number of full-time employees: 570
Incorporated: YES [X] NO [ ]

II. TRAINING PROVIDER INFORMATION (*To be completed by Training Provider):*

Organization: Jewish Vocational Service/Jewish Home
Telephone #: 415/391-3600
Address: 225 Bush Street, Suite 400, San Francisco, CA 94104 *and as above*
Name & Title of Contact Person: Jim Torrens, Director of Training
Federal Employer Identification Number:
State Identification Number:
Workers' Compensation Policy Carrier: State Compensation Insurance Fund
Workers' Compensation Policy No.: 1722387
Expiration Date: January 1, 2005
PIC's Eligible Training Provider Lists (ETPL) Number *(if applicable)* N/A

III. INSTRUCTOR'S QUALIFICATION *(To be completed by Training Provider*):

Name & Title of Instructor: Lead Instructor: Elaine Sugitan, RN
Instructor: vacant – RN required
Job Readiness Instructor: Yolanda Silva

Years of Relevant Experience: Please see instructor resumes, attached.

Does he/she have a teaching certificate or other credential (*if yes, please attach a copy*)? Please see attached resumes for credentials.

References: Please attach at least two clients for which comparable training was performed by you.

Sonia Nikazy	Joshua Espino	Joanne Balderama
(415) 648-6725	(415) 468-6703	(415) 252-7323

IV. TRAINING PROGRAM DATA (*To be completed by Employer and Training Provider*): *(use an attached sheet is necessary)*

A	B	C	D
Trainee Name (For Current Employee)	Participant(s) Job Title (For Current Employee)	Pre-Training Wage	Post Training Title
N/A	**N/A**	**N/A**	**Certified Nursing Assistant**

(a) Recruitment:

Do you need help in the recruitment of trainees? NO

If so, how many trainees do you need to recruit? ______

(b) Qualification:

Do you have an employee minimum qualification skill set? This would be a set of expected employee skills such as literacy and fluency in English, appropriate grooming skills, and the like.

X Yes ***(See Certified Nursing Assistant job description, attached.)***

☐ No

Would you like PIC to provide one for you?

☐ Yes

X **No**

V. TRAINING COST *(To be completed by Training Provider):*

Complete and attach forms CTP 100 and CTP 222, as this will constitute your PIC invoice upon acceptance of proposal.

	Cost
A. INSTRUCTIONAL COST	$231,390
B. TRAINING MATERIALS	$1,350
C. TRAINING FEES	$7,260
TOTAL	$240,000

VI. ORGANIZED LABOR CONCURRENCE:

Concurrence Given By: N/A
NAME OF UNION REPRESENTATIVE
Title: Date:

VII. TRAINING OUTLINE (to be completed by Employer and Training Provider)

OES JOB TITLE: Nursing Aides, Orderlies, and Attendants OES #: 31-1012

EMPLOYER'S TITLE FOR THIS JOB: Certified Nursing Assistant

To Be Completed By the Training Provider
Include a detailed outline of training to be provided, tasks to be learned, and approximate hours of training required for each task.

Job readiness pre-course
JVS will offer a 12-hour Job Readiness pre-course that will focus on organizational skills and other "soft" skills students may need assistance with prior to working in a structured, health care environment. JVS will facilitate this training and will utilize curricular materials developed with input from the Jewish Home to ensure that this training offers students the best chance to succeed as CNAs.

CNA training
The Jewish Home will provide curriculum, instructors, and classroom space for the CNA training. We propose two cycles of training, which would run September – November 2004 and March – May 2005.

Under the existing and proven training model, the Jewish Home hires trainees prior to the start of training and pays them a wage based on entry-level CNA wages. We propose an On-the-Job-Training component whereby the Jewish Home will then be reimbursed for half of those wages.

Training consists of an eight-week, full-time state-approved curriculum covering the following topics:

a) Rehabilitation Care, including assisting patient to walk (4 hours)
b) Emergency Procedures, including Heimlich, applying restraints, applying supports (3 hours)
c) Patient Care Skills, including personal hygiene, bowel and bladder retraining (54 hours)
d) Vital Signs, including pulse, respiration, temperature, blood pressure (6 hours)
e) Measuring, including output and intake (1 hour)
f) Nutrition, including use of feeding assistance devices (6 hours)
g) Observation and charting (6 hours)
h) Resident Care Procedure, including collection and identifying specimens, administering enemas and suppositories, care of residents with tubing (20 hours)
i) Medical and Surgical Asepsis, including proper hand washing and universal precautions (8 hours)
j) Body Mechanics, including moving helpless residents, positioning the resident, transfer from wheelchair to bed and back (5 hours)
k) Residents Rights, including privacy curtains, keeping records confidential (2 hours)
l) Theory, Introduction to lay term care, working environments, special needs of elderly, basic nursing care, anatomy and physiology (110 hours)
m) Skills Lab, Vital signs, ambulation, transfer technique, bed making (91 hours)

JVS will provide ongoing support for students during their training. This support may include tutoring, assistance with childcare and transportation, and referral to other supportive services.

To Be Completed By the Employer
Provide a thorough description of the job skills for which training is being requested.

Please refer to training program outline, above, and job description, attached.

To Be Completed By the Employer

(1) How would you define successful completion of training program? Please be specific, as this definition will be used to evaluate success of training program and the participants' suitability for post training placement/ advancement.

Over the course of the program, students will be administered daily tests addressing each day's subject matter (see Training Outline, above). To successfully complete, students may not fail more than seven of these tests over the entire 8-week training period.

In addition, strict attendance, particularly during clinicals, is required. To successfully complete, students may not miss more than eight of 100 hours of clinical practice time over the course of the training period.

The ultimate measure of whether participants have successfully completed the program is a final exam, based on the State of California's Certified Nursing Assistant exam and including both theoretical and practical components covering the topics described in the Training Outline, above. To successfully complete the program, each participant must receive a passing grade on this exam.

For more detail, please see Criteria For Successful Completion of the Pre-Certification Program, attached.

(2) Do you have an assessment tool to assess trainee's skills attainment?

X **Yes**

☐ No

If yes, please attach.

Over the course of the training period, staff are continuously assessing participants' skills attainment, as described immediately above.

Ultimately, however, all trainees must pass the State of California Department of Health Services written and practical examination to obtain a certificate as a Certified Nursing Assistant before hire. This is the primary, externally valid measure of skills attainment.

(3) Please detail the number and type of positions that you plan to open, or the number of employees and type of positions that you plan to advance upon successful completion of the training.

The Jewish Home has ongoing need for well-trained Certified Nursing Assistants. In the coming year, the Jewish Home expects to hire at least 20 new CNAs (and likely more), all of them successful completers of the CNA training program. In the event that insufficient openings are available at the time of training completion, however, successful training completers who are not hired by the Jewish Home should have little difficulty finding CNA jobs with other local employers in need.

EMPLOYER ASSURANCES

As a condition of the Customized Training Agreement, the Employer must:

1. Identify customized training program participants.
2. Make good faith effort to hire or advance trainee(s) at the successful completion of the training within 30 calendar days. Advancement must take the form of wage increase, work hour increase, benefit increase or a combination of all three.
3. For the training of existing employees, provide the participants with an increase in benefits or earnings, *and* a greater potential for career advancement when compared with those received prior to their training.
4. Insure all trainees are not currently earning a self-sufficient wage that has been determined by the Local Board as $15.08 per hour or $2,652.75 per month. Providing supporting documentation such as salary records, W-2 forms or the like will satisfy this.
5. Fully complete Training Outline.
6. Pay at least 50% of the training cost plus any agreed upon administrative costs.
7. Make payment of the Employer Contribution to the PIC in two installments; 50% upon signing of the agreement, and the balance upon completion of the training program *regardless* of trainee(s)' training performance outcome.
8. Provide periodic data to PIC for monitoring review and continuous improvement purposes.

PIC ASSURANCES

As a condition of the Customized Training Agreement, the PIC will:

1. [illegible] the customized training funds.
2. Monitor the training provider's performance.
3. Facilitate communication between the employer and the training provider.
4. Report monthly, quarterly and annual program outcomes as needed for the Employer, the Training Provider and the WIB Employer Services Committee.
5. Provide trainee's eligibility certification.
6. Provide authorization of enrollment subject to the Employer's selection.
7. Retain license or title to intellectual, personal, and real property produced or purchased under the agreement.
8. Approve Employer's successful completion criteria.

TRAINING PROVIDER ASSURANCES

As a condition of the Customized Training Agreement, the Training Provider must:

1. Comply with all provisions of state and federal equal opportunity and nondiscrimination laws including but not limited to: Title VI and VII of the Civil Rights Act of 1964, as amended; the Age Discrimination Act of 1975, as amended; Sections 503 and 504 of the Rehabilitation Act of 1973; and the Americans with Disabilities Act of 1990.

2. Not exclude from participation in, deny the benefits of, subject to discrimination by, or deny employment in the administration or any program or activity any individual because of race, color, religion, sex, national origin, age, disability, political affiliation or belief.

3. Comply with the child labor provisions of the Fair Labor Standards Act (FLSA.)

4. Comply with provisions that limit the use of funds for political activities.

5. Disclose lobbying activities pursuant to 31 USC 1352.

6. Establish safeguards to prohibit employees from using their positions for a purpose that is or appears to be for private gain for themselves or others, particularly those with whom they have family, business, or other ties.

7. Maintain of appropriate standards of health and safety in work and training.

8. Comply with the required provision of workers' compensation protection to participants in customized training, at the same level and to the same extent as other employees of the employers who are covered by a state or industry workers' compensation statues; and provision of workers' compensation insurance or medical and accident insurance for injury or disease resulting from their participation.

9. Insure the program has adequate administrative controls, personnel standards, evaluation procedures, availability of in-service training and other policies as may be necessary to promote the effective use of the subcontract funds.

10. Insure all of the training provider's employees and all of its subcontractors (if applicable) will act professionally and will comply with all requirements of the federal Privacy Act, all pertinent requirements of California State law (specifically, section 1798.55 of its Civil Code, section 10850 of its Health and Welfare Institutions Code, section 501 of its Penal Code, and section 2111 of its Unemployment Insurance Code), all pertinent requirements of the San Francisco Administrative Code, agreements which the PIC has entered into with agencies of the Federal, State of California, and City and County of San Francisco governments and the PIC's policies and procedures in treating all particularized information on individual employers and participants confidentially, sharing such information only with other authorized persons or organizations, and formally requesting written authorization form the PIC before releasing such information in specific circumstances where the applicability of any of these requirements might be unclear.

11. Comply with the provisions of the Fair Employment and Housing Act (Govt. Code, Section 12900 et seq.) the regulations promulgated thereunder (California Administrative Code, Title 2, Section 285.0 et seq.) the provisions of Article 9.5, Chapter 1, Part 1, Division 11135 – 11139.5) and the regulations or standards implement such article.

12. Understand that it may be subject to the examination and audit of the Auditor General for a period of three years after final payment under the subcontract (Govt. Code Section 10532.)

13. Certify that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal debarment or agency [Executive Order 12549, Debarment, and Suspension, 29 CFR Part 98, Section 98.510, Participants' Responsibilities.]

14. Provide occupational skills training as subcontracted.

15. Assist the employer and employee with job retention services when necessary.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** AUGUST 11, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATIONS FOR WIA TITLE 1B YOUTH SERVICE SUBCONTRACTORS FOR PROGRAM YEAR 2004-2005 (Agenda Item 6d)

ACTION REQUESTED

The Executive Committee recommends option A regarding supplemental WIA Title 1B (Formula) funds for Program Year 2004-2005 in the amount of $265,000 for consideration by the WISF Board. This recommendation is contingent on the continuing availability of WIA Title 1B youth funds in an amount necessary to meet current and future needs and obligations.

BACKGROUND

On June 16, 2004 the Workforce Investment San Francisco (WISF) Board ratified the May 27, 2004 Youth Council action to award WIA 1B youth funding to nineteen (19) subcontractors resulting from a Request for Proposals (RFP) issued on February 27, 2003, and to issue a new solicitation for youth services to be funded with $265,000 previously set aside for One Stop support and capacity building activities. On June 17, 2004 the Youth Council adopted a youth services solicitation framework including calendar, program requirements, program eligibility, performance measures and solicitation criteria for Workforce Investment Act (WIA) Title 1B dollars targeted to youth residing in Bayview-Hunters Point (BVHP), Oceanview Merced and Ingleside (OMI), Sunnydale and Western Addition. On June 22, 2004, the PIC issued an RFP. The solicitation will cover a period up to three years beginning with the execution of the first agreement resulting from the solicitation.

SOLICITATION METHODOLOGY

An RFP was issued on June 22, 2004 and a bidders conference was conducted on July 1, 2004. Proposals required a detailed program description and budget to serve an identified number of youth (consistent with the program design and program elements requirements of WIA), and were due July 14, 2004. A selected proposal will result in a cost reimbursement subcontract.

Proponents were encouraged to address the Youth Council's strategic priorities and supportive strategies, detail how they would reach and effectively serve youth in the targeted neighborhoods, provide evidence of past performance, as well as describe how youth development principles will be incorporated in their programs.

SOLICITATION RESPONSE

Request for Proposal (RFP)	11 proposals received 11 proposals reviewed
Total amount requested	$1, 322,530

Refer to Table I for a list of all proposals reviewed.

REVIEW PROCESS FOR PROPOSALS

A diverse panel of reviewers was appointed to review proposals. These individuals included representatives of the Department of Human Services (2), the Bayview-Hunters Point Foundation, PIC's YO!SF Program and the Japanese Community Youth Council's Youth Works Program. A PIC youth services Contract Administrator was assigned to each team to assist in the review process, but did not score proposals.

The 11 proposals were divided into two groups based on the order in which they were received and assigned to three reviewers who scored the applications according to the selection criteria and weights adopted by the Youth Council. The review team met to aggregate proposal scores, averages were calculated for each criteria and a sum of the averages was determined. Proposals were then sorted by their average score.

Table I lists all proponents in descending order by average score. Average proposal scores were totaled and percentages of individual scores to the total of all average scores were calculated. This average was multiplied by the total amount available to determine individual funding amounts. Option A executes this methodology for the proponents with the highest three scores. Option B executes this methodology for the proponents with the highest five scores, and Option C executes this methodology for all proponents.

STRATEGIC CONSIDERATIONS

Every effort was made to maximize the return on the dollar amount recommended based on the quality of the program as described in the proposal, the cost per youth served and the geographic and priority population distribution. Option A includes the three highest scoring proponents with very close scores. This option results in funding amounts that are viable for the services expectations and complexity of a WIA-funded program. An average score break appears between those included in Option A and the two additional proponents included in Option B. Option B reduces individual funding awards but does increase the total projected service level. There is an even larger average score break between proponents included in Option B so those included in Option C. The break between Option B and C also represents a point of diminishing returns when considering total number of youth served. Finally, the Youth Council should consider the administrative and opportunity cost associated with a large number of subcontractors. With 19 subcontracts already approved (10 of whom are new) and with fixed administrative resources, staff ability to provide a consistently high level of contract administration, performance management and technical assistance will be diminished with a larger number of subcontractors.

RECOMMENDATION

The Executive Committee recommends option A regarding supplemental WIA Title 1B (Formula) funds for Program Year 2004-2005 in the amount of $265,000 for consideration by the Executive Committee. This recommendation is contingent on the continuing availability of WIA Title 1B youth funds in an amount necessary to meet current and future needs and obligations.

Attachment

PIC STAFF RECOMMENDATIONS
SUPPLEMENTAL WIA 1B FORMULA YOUTH PROGRAMS
August 16, 2004 - June 30, 2005

							OPTION A			OPTION B			OPTION C		
Proposal #:	PROPONENT NAME	Proposed Amount Requested	Proposed Service Level	Proposed Cost Per Youth	Proposed Targeted Neighborhood(s): BVHP-Bayview, OMI-Ocean/ Merced/Ingleside Western Addition & Sunnydale	SCORE	Multiplier	PY 04/05 Total Recommended Amount	PY 04/05 - Recommended Service Level	Multiplier	PY 04/05 Total Recommended Amount	PY 04/05 - Recommended Service Level	Multiplier	PY 04/05 Total Recommended Amount	PY 04/05 - Recommended Service Level
11	Ingleside Community Center	$70,949	20	$3,547	OMI	81.72	0.335385	**$70,949**	**24**	0.207508	**$54,990**	**18**	0.108876	**$28,852**	**10**
8	Youth Chance H.S., Embarcadero YMCA	$122,802	25	$4,912	ALL FOUR	81.43	0.334223	**$97,585**	**26**	0.206789	**$54,799**	**14**	0.108498	**$28,752**	**8**
1	Young Scholars Program	$134,583	83	$1,621	BVHP	80.50	0.330392	**$96,466**	**59**	0.204418	**$54,171**	**33**	0.107255	**$28,422**	**18**
9	Asian Neighborhood Design *	$150,000	30	$5,000	ALL FOUR	77.88				0.197774	**$52,410**	**11**	0.103768	**$27,499**	**5**
10	Family Restoration House	$103,294	119	$868	BVHP	72.27				0.183511	**$48,630**	**56**	0.096285	**$25,516**	**29**
2	Inner City Youths	$56,063	30	$1,869	OMI	66.50							0.088602	**$23,479**	**13**
3	Young Community Developers	$262,045	40	$6,551	ALL FOUR	63.83							0.085049	**$22,538**	**4**
5	Arab Cultural and Community Center	$66,000	60	$1,100	OMI	63.67							0.084827	**$22,479**	**20**
4	Northern California Service League	$89,326	22	$4,060	ALL FOUR	62.50							0.083272	**$22,067**	**5**
6	Urban Services YMCA/BVHP Community Beacon	$217,468	75	$2,900	BVHP	53.67							0.071503	**$18,948**	**7**
7	Infusion-One	$50,000	25	$2,000	BVHP	46.58							0.062066	**$16,447**	**8**
		$1,322,530	529	$2,500		243.65		**$265,000**	**109**	393.80	**$265,000**	**133**	750.55	**$265,000**	**127**

* AND - Awarded funds through the February 27, 2004 RFP in the amount of $81,303

FINAL SERVICE LEVELS WILL BE NEGOTIATED

07/22/04

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** AUGUST 11, 2004

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: RECOMMENDATIONS FOR FEDERAL FISCAL YEAR (FFY) 2004 REFUGEE EMPLOYMENT SOCIAL SERVICES (RESS) AND TARGETED ASSISTANCE (TA) FORMULA ALLOCATIONS AND COUNTY PLAN GOALS (AGENDA ITEM 6E)

ACTION REQUESTED

The WISF Board is asked to approve an expenditure plan for FFY 2004 formula TA and RESS funds and 2004 County Refugee Plan goals.

BACKGROUND

Four proposals from four organizations were received by the July 6 deadline in response to PIC's Request For Proposals (RFP) issued June 8, 2004. Each proposal was read and scored by two members of the review Task Force.

The total amount of funds available for these recommendations is **$329,913**. The total amount of funds requested was $434,861. When the RFP was issued, the total preliminary amount of funds available for services was $322,134. Since then, final allocations were received.

RECOMMENDATIONS – FUNDING

Two tables are attached:

- Table 1 presents the recommended funding scenario. The Table displays each of the proposals sorted by activity and includes requested funding amounts, preliminary funding amounts for FFY 2003, current funding levels, and initial recommendations for FFY 2004 funds. The service levels for those proponents recommended for funding have been adjusted based on the dollar amount being recommended. The recommended placements are based on the proposed placement rate submitted by each proponent.
- Table 2 displays the point scores for each of the proposals sorted by activity.

The funding recommendations on Table 1 include 16% of the services funds for the Central Intake Point (CIP), 76% for Employment Services, and 8% for supportive services/participant fast passes. Refugees and asylees needing vocational training or on-the-job training (OJT) will have to have it subsidized with other funds, such as Workforce Investment Act (WIA), welfare to work, H1-B, or other funds that are in San Francisco's workforce development system.

CIP

The International Rescue Committee (IRC) is recommended for funding to operate the CIP. There was no competition for this activity. The funds recommended for the CIP are reduced from the current dollar amount. The CIP includes mandatory services (intake, assessment, referral, tracking, etc.) that need to be adequately funded so the CIP can maintain language capacity and competency to assist any refugee or asylee seeking services.

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Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org

1650 Mission Street, Suite 300 • San Francisco, CA 94103-2490
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TDD 800.735.2929 (CRS)

ES

Two of the three employment services proposals are recommended for funding: Catholic Charities CYO (CCCYO) and Jewish Vocational Service (JVS). The African Immigrant & Refugee Resource Center (AIRRC) is not recommended for funding.

CCCYO and JVS have demonstrated the ability to competently perform, meet their obligations, and be accountable. They have served and are continuing to serve the refugee and asylee communities well.

The PRC has directed staff to explore capacity building resources for AIRRC, and to consider the AIRRC proposal again when carry forward funds become available.

RECOMMENDATIONS – COUNTY PLAN GOALS

The following table contains the State-approved FY 2003 goals and proposed FY 2004 goals. The goals are estimates based upon historical performance data and current economic conditions. Definitions for the measures are listed below the table. An adjustment is suggested for cash aid reductions and terminations to more closely correspond with aid type [Refugee Cash Assistance (RCA)/TANF]. Historically, we have served a larger number of RCA cases as these clients are required to enroll in the refugee-funded programs, and when they obtain employment, they usually have their aid terminated rather than reduced. We are also recommending raising the average hourly wage goal to match the wage solicited in the RFP in order to aid refugees and asylees in their quest for self-sufficiency. We also recommend raising the 90-Day Employment Retention Rate, as last year we exceeded our goal.

	FY 2003	**FY 2004**
Employment Entry Rate	57%	57%
Cash Assistance Termination Rate	67%	80%
Cash Assistance Reduction Rate	33%	20%
Average Hourly Wage	$10.00	$10.51
Employment Retention Rate (90 days)	75%	80%
Entered Employment with Health Benefits Rate	75%	75%

The County Plan will also have to be approved by the Board of Supervisors and the California Department of Social Services' Refugee Programs Bureau.

Attachment

cc: Refugee Proponents
Bunny Furlo, CDSS
PIC, DHS Staff

TABLE 1
EXECUTIVE COMMITTEE COMMITTEE FY 2004 REFUGEE FUNDING RECOMMENDATIONS

Proponent	Activity	Amount Requested*	Initial FY 2003 Funding	Current FY 2003 Funding**	Initial FY 2004 Recomm	TA	RESS	Recom.		Place. Rate
								Svc.	Plc.	
International Rescue Committee	CIP	$53,679	$57,159	$60,388	$53,679	$38,182	$15,497	NA	NA	NA
Catholic Charities CYO	ES	$139,200	$92,500	$97,647	$123,000	$87,489	$35,511	60	39	65%
Jewish Vocational Service	ES	$181,982	$113,945	$120,493	$128,259	$91,230	$37,029	51	34	67%
African Imm. & Refugee Res. Center	ES	$60,000	$0	$0	$0	$0	$0			
Subtotal		$434,861	$263,604	$278,528	$304,938	$216,901	$88,037	111	73	66%
Supportive Services/Transportation			$22,440	$26,383	$24,975	$17,765	$7,210			
Other Services Previously Funded	A/SAS, VT		$66,160	$69,991	$0	$0	$0			
Total			$352,204	$374,902	$329,913	$234,666	$95,247			
PIC Administration			$62,153	$65,712	$58,220	$41,412	$16,808			
Grand Total			$414,357	$440,614	$388,133	$276,078	$112,055			

*Amounts Requested for ES activities include funds for supportive services/transportation, except for the African Imm. & Refugee Res. Ctr, which did not provide this requested estimate.
**Current FY 2003 funding includes carry forward FY 2002 funds.

CIP Central Intake Point
ES Employment Services

TABLE 2
POINT SCORES

No.	Proponent	Activity	Proposal Criteria							Total
			1a	1b	1c	2a	2b	2c	3	
2	International Rescue Committee	CIP	8	4	23	22	14	5	14	90
1	Catholic Charities CYO	ES	10	24	NA	14	15	20	15	98
4	Jewish Vocational Service	ES	9	24	NA	14	13	18	14	92
3	African Imm. & Refugee Res. Center	ES	7	16	NA	10	11	13	12	69

8/11/04

TABLE 2
POINT SCORES

			Proposal Criteria							
No.	**Proponent**	**Activity**	**1a**	**1b**	**1c**	**2a**	**2b**	**2c**	**3**	**Total**
2	International Rescue Committee	CIP	8	4	23	22	14	5	14	90
1	Catholic Charities CYO	ES	10	24	NA	14	15	20	15	98
4	Jewish Vocational Service	ES	9	24	NA	14	13	18	14	92
3	African Imm. & Refugee Res. Center	ES	7	16	NA	10	11	13	12	69

10/11/2004

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MINUTES OF THE OCTOBER 20, 2004 MEETING OF THE WORKFORCE INVESTMENT SAN FRANCISCO BOARD

The meeting was held at in the Union Square Room of the Ramada Plaza International Hotel located at 1231 Market Street in San Francisco, California.

PRESENT:
Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Lynn Bunim, Pamela Calloway, Pat Christensen, Ann Cochrane, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, Abby Snay and Dan Whooley

ABSENT:
Jesse Blout, Anni Chung, Kathye Citron, Kimberly Cousin, Philip Day, Gregg Fortner, Sally Gallegos, Dwayne Jones, Leslie Luttgens, Nate Mason, Brian Murphy, Craig Newmark, Trent Rhorer, Marsha Rosen, Tom Ryan, Marlen Saritzsky, Dana Serleth, Erika Thorson-Garay, and Stan Warren

STAFF:
Brenda Brown, Ana Chamorro, Alice Chiu, Wes Dixon, Karen Hart, Raymond Holland, Lucia Hughes, Emma Perez, Michael Peters, Zelda Saeli, Adrian Trujillo, and

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PUBLIC (AS EVIDENCE BY SIGN-IN SHEET):
Valina Agbabian, Herb Anderson, Devra Edelman, Lorraine Giordano, Carol Harlow, Rob Huglund, Greg Johnson, Henry Lau, Bernard Leung, Mark Mak, Catherine Markman, Jeremy O'Neil, Nadine Ortiz, Dean Osdia, Yelena Skuratovskaya, Gerry Souzis, Kevin Stange, Joel Streicker, and Sam Tuttleman

The meeting was convened at 9:45 AM with a quorum present.

Chair Bunim welcomed and introduced the new Members that were present: Deborah Alvarez, Pat Christensen, Emilio Cruz, Kristine Gagliardi, Jennifer Hermann, Ralph Lee, Tom Lucas, and Susan Penway.

Motion to adopt the agenda was made by Victor Revenko and seconded by Sonia Melara.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Ann Cochrane, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, Abby Snay and Dan Whooley
Nays: None
Abstentions: None
Motion passed.

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Motion to adopt the minutes of the June 16, 2004 and September 15, 2004 meetings was made by Victor Revenko and seconded by Abby Snay.

Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Ann Cochrane, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, Abby Snay and Dan Whooley

Nays: None

Abstentions: None

Motion passed.

Item 4 – Presentations

Quarterly Update: San Francisco's Labor Market and Aging Workforce

Kevin Stange presented an overview of the labor market and the aging workforce in San Francisco.

Highlights of San Francisco's Labor Market

- San Francisco's unemployment continues to improve
- Adjusted unemployment rate down to 5.2%
- 23,000 San Franciscans still out of work
- The number of jobs in San Francisco is slowly growing

Highlights on San Francisco's Aging Workforce

- Older workers (over 55 years old) are fastest growing population segment
- Soon-to-be-retirees make up 13% of workforce
- Workforce aging will be particularly acute in education and health care
- Workers in information technology and hospitality are relatively young

Mr. Stange recommended four actions individual employers could take to address the workforce aging issue:

- Analyze the age distribution of the organization's workforce
- Expand education and internal promotion opportunities for young workers
- Create an engaging workplace in order to improve recruitment and retention
- Implement flexible work arrangements to enable older employees to work longer

Mr. Stange further recommended that the Board respond by developing workforce development policies:

- Young worker attraction, particularly to education and health careers
- Career advancement encouragement
- Continued support for immigrant integration

Darlene Rutkowski asked why people with disabilities and other barriers, who have a high unemployment rate, were not addressed in the presentation. Mr. Stange replied that the focus is particularly on the aging workforce and he offered to address the disability sector in a future presentation.

Aileen Hernandez asked what is the definition of "unemployed". Mr. Stange replied that the "unemployed" are defined in the presentation as actively looking for work but not working.

Nicholas deLorenzo thanked Mr. Stange for his presentation and stated that he match Mr. Stange's figures with national figures and they were fairly close. The younger workers, according to national data, would not be able to fill the gap as the older workers retire or move up the career ladder.

Michael Blecker asked about the average hourly wage and benefits for each of the healthcare occupations. Mr. Stange replied that the data is available and he would be able to provide that information at a subsequent meeting.

Theresa Feeley sited David Elwood from Harvard who also conducted a similar research. She stated that in addition to the numbers gap, there is also a skill gap (which is why investing in workforce development is essential). She also stated that it would be helpful to look at the specific industries where older workers are employed and view both the supply and demand side of the equation (employer and jobseeker).

Chair Bunim stated that she would like to get this presentation to employers and challenged the Board to use this presentation and engage employers in San Francisco.

Information Technology Consortium: Delivering Digital Diversity
Lorraine Giordano presented an overview of the Information Technology Consortium (ITC) program and achievements. She stated that this presentation is the condensed version of the white paper that would be distributed to Board members at the end of October.

ITC was implemented by the Workforce Investment San Francisco Board (WISF Board) to capitalize on the “dot com” boom in San Francisco. ITC also responded to the welfare reform and to bridge the “digital divide”. ITC developed a career ladder for training and advancement. The Consortium includes partners from Arriba Juntos, Bay Area Video Collaborative, City College of San Francisco, the Private Industry Council and many others. These organizations have invested significant resources to make this consortium successful. All partners share a commitment to encourage their participants to seek higher education though the community college.

Through various grants, the ITC has received $5 million to develop and implement the career ladder. The ladder was designed to provide non-duplicative and progressive IT and IT-related training. The ladder focuses on three areas: clerical/administrative, digital media, and networking technologies. Students can enter at any “rung” depending on capacity and interest and progress either laterally or vertically.

ITC responded to the dot com "bust" by rebuilding employer relationships, realigning the career ladder and showcasing the ITC programs to employers. The ITC also address dual customers: employer and jobseekers. They prescreen applicants before referring the clients to the employer. Some of the employers that partner with ITC are (and not limited to): Adecco, Kaiser Permanente, Genentech, PG&E, and Wells Fargo.

ITC has trained more than 760 and placed more than 300. There are currently 48 on-the-job training (OJT) participants earning wages of $9.50 - $80.00 per hour. The median wage is $15, significantly higher than the minimum wage. ITC has leveraged $500,000 in OJT income to the City’s economy.

Ms. Giordano introduced one of ITC’s corporate partners, Rob Huglund of Adecco, to talk about his experience with ITC.

Mr. Huglund is the Program Manager for Adecco at Genentech. He stated that Adecco has a positive relationship with ITC. It started when Mr. Huglund took over an on-site account with Genentech. Adecco started working with ITC because of Genentech's growth and specific needs. One specific Genentech requirement is proficiency with a software tool, Corporate Time, for which Adecco partnered with ITC to tailor a specific program to train the participants

Chair Bunim asked Board Members what they would like to do with these reports.

Nathan Nayman stated that the November 2nd ballot measure Proposition I (the creation of an economic development plan for San Francisco) is crucial for San Francisco and the Board should be involved in that process should the proposition pass. Pat Christensen added that the process also includes the Small Business Commission, as any measures that affect small businesses must be presented to the Small Business Commission before the Board of Supervisors addresses it.

Ms. Christensen asked how many small businesses responded to ITC's outreach. Catherine Markman, ITC's Director of Corporate Development, replied that the general response is to bring on interns first and then if budget allows, hire them full time.

William Allen wanted to know what part of the presentations could be used for the next Board retreat. He would like a report of what the WIB has done in response to this information. Mr. Allen was also concerned that One Stops were not mentioned in the ITC partnerships.

Ms. Giordano responded to Mr. Allen's concerns, stating that ITC will be doing additional outreach in the One Stops. Mr. Allen wanted the One Stop Committee to monitor this activity to ensure that all resources are leveraged.

John Poremba was concerned that the Board has not taken necessary strategic action to address the critical shortage in the healthcare industry in the next 10 to 20 years and encouraged the Board to begin the dialogue. He suggested inviting all of the major stakeholders to the meeting, as the Board's training dollars are just a small portion in the city.

Abby Snay added that the Board should leverage the meetings already happening in different communities.

Chair Bunim asked John Poremba, Abby Snay, Theresa Feeley, Jennifer Hermann, and Linda Groah to take the lead in coordinating this much-needed discussion. Nathan Nayman suggested inviting the Hospital Council and possibly hold a regional symposium.

Michael Blecker suggested putting together a post election analysis at the next Board retreat to guide the Board in its strategic planning.

Item 5 – Bylaw Amendments

Pamela Calloway presented an overview of the recommendations for amendments to the WISF Bylaws. These amendments address three issues that have been raised by Board members: (1) the term of office; (2) quorum requirements; and (3) assigning local eligibility decisions for adult participants to a committee for initial review and policy recommendations.

1) Proposed Bylaw Amendment: 3.6 Term of appointment

The regular term of appointment of each Member shall be two (2) years, expiring on January 31st of every other year or until a successor is appointed by the Mayor, whichever occurs last.

However, the initial term for not more than 50% of the Members appointed in February 2005, randomly selected, shall be one (1) year so that only 50% of the Members are replaced or re-appointed at one time. Thereafter all terms shall be 2 years.

2) Proposed Bylaw Amendment: 6.4 Quorum
No enforceable action may be taken at a meeting that lacks a quorum.
a. Constitution of a quorum
1. LWIB: At all meetings of the LWIB, presence of nineteen (19) Members shall constitute a quorum, provided that at least half of those present are business representatives.
2. All Committees: The presence of a majority of the Members at a meeting of each committee shall constitute a quorum.

b. Failure to achieve a quorum
When a quorum is not achieved, neither the LWIB nor any of its committees may take action on agenda items. However, Members may remain to discuss matters of their choosing with the public, and those proceedings may be presented at a subsequent meeting so that they form part of the subsequent meeting's records.

3) Proposed Bylaw Amendment: 5.3 Program Resources Committee
The Program Resources Committee shall be responsible for the review and advice to the Executive Committee and to the LWIB of policy and funding recommendations for programs and services for adult job seekers. This Committee shall develop and recommend portions of the San Francisco Local Plan for Workforce Investment and Development as required by various federal, state, and local agencies, relating to adult services, including service delivery methods. This Committee shall develop and recommend program plans, eligibility requirements, priority of services, and design and solicitation criteria for adult job seekers. This committee shall also prepare recommendations for local criteria for the Eligible Training Provider List (ETPL). Subcommittees of the Program Resources Committee shall be appointed at the discretion of the LWIB Chairperson and this Committee Chairperson and may include special populations, e.g. refugees, homeless persons.

Motion to adopt the Bylaw amendments was made by Sonia Melara and seconded by Rosalie Bulach.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, and Abby Snay
Nays: None
Abstentions: None
Motion passed.

Chair Bunim asked the Members to complete the Conflict of Interests Forms.

Item 6 – Executive Committee Recommendations
A. Ratification of Year 9 of the Homeless Employment Collaborative (HEC) Recommendations
Pamela Calloway presented a brief overview of Executive Committee's recommendation to ratify an expenditure plan for Year Nine of the HEC.

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt Item 6A was made by Ann Cochrane and seconded by Leslie Luttgens.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, and Abby Snay
Nays: None
Abstentions: Deborah Alvarez and Michael Blecker
Motion passed.

B. Ratification of Acceptance of Community Development Block grant (CDBG) Funds to Operate the Tax Credit Vouchering Project in PY 2004
Pamela Calloway presented a brief overview of Executive Committee's recommendation to ratify the acceptance of 2004 CDBG funding of $70,000 to operate the Tax Credit Vouchering Project.

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt the recommendation was made by Susan Penway and seconded by Sonia Melara.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, and Abby Snay
Nays: None
Abstentions: None
Motion passed.

C. Ratification of Jewish Home for the Aged Customized Training Proposal to Operate a Certified Nursing Assistant Training Program
Pamela Calloway presented a brief overview of Executive Committee's recommendation to approve the Customized Training proposal of Jewish Home for the Aged (JHA) to operate a Certified Nursing Assistant training program. Ms. Calloway clarified that the amount that JHA is requesting is $101,090.

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt the recommendation was made by William Allen and seconded by Linda Grohe.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, and Ave Seltsam,
Nays: None
Abstentions: Abby Snay
Motion passed.

D. Ratification of Recommendations for PY04-06 Youth Service Request for Proposals Solicitation for Services to Youth Residing in the Bayview-Hunters Point, Oceanview-Merced-Ingleside, Sunnydale and Western Addition neighborhoods

Pamela Calloway presented a brief overview of Executive Committee's recommendation to approve the supplemental allocation of WIA Title 1B (Formula) funds for Program Year 2004-2005 in the amount of $265,000 ($70,949 for Ingleside Community Center, $97,585 for Youth Chance High School, Embarcadero YMCA, and $96,466 for Young Scholars Program).

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt the recommendation was made by Aileen Hernandez and seconded by Linda Grohe.

Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, and Abby Snay

Nays: None

Abstentions: None

Motion passed.

E. Ratification of Recommendation for Federal Fiscal Year (FFY) 2004 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) Formula Allocations and County Plan Goals

Pamela Calloway presented a brief overview of Executive Committee's recommendation to approve an expenditure plan for FFY 2004 formula TA and RESS funds and 2004 County Refugee Plan goals.

Chair Bunim asked if there was any public testimony on the agenda item. There was none.

Motion to adopt the recommendation was made by Michael Blecker and seconded by William Allen.

Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, Susan Penway, John Poremba, Victor Revenko, Darlene Rutkowski and Ave Seltsam

Nays: None

Abstentions: Abby Snay

Motion passed.

Chair Bunim encouraged new members to serve on or attend a committee meeting, where all the hard work and discussion takes place.

Item 7 – Committee Reports

Finance Subcommittee

Curt Kirschner reported that the Finance Subcommittee meets regularly to review and discuss quarterly financial reports for the Private Industry Council of San Francisco, Inc.

Chair Bunim added that the Board recently had an opportunity to grow the pie and asked Theresa Feeley to speak more on that. Ms. Calloway noted that the article is in Board Member's books. Ms. Feeley stated that the Board has been successful in the past months to bring more money into the city for biotechnology training and expanding opportunities to the City's diverse population. City College of San Francisco and San Francisco Works received a $1.1 million grant from the National Science Foundation to support On-Ramp, a 10-week program that trains low-income residents for entry-level positions in biotech, and Bridge to Biotechnology program, which involves a semester of study in biotech, language and math.

Employer Services Committee
Nathan Nayman reported that the Employer Services Committee did not achieve a quorum at its last meeting. The Committee continues to discuss the customized training program and its policies. The Committee also plans to meet with the Program Resources Committee.

One Stop Committee
Rosalie Bulach reported that the One Stop Committee met and completed the One Stop Business Plan Innovations. The Committee is also in the process of reviewing the budget and the process.

Item 9 – President's Report
Pamela Calloway presented a comprehensive report on local initiatives to address workforce and community needs, legislative news, and new partnership and funding opportunities.

Abby Snay informed the Board that the Moore Foundation awarded Jewish Vocational Service and City College of San Francisco funds to the nursing partnerships to train LVNs and RNs. The Bay Area Collaborative will also be announcing additional funds for this partnership.

Chair Bunim stated that there should be a presentation on the healthcare sector at the next Board meeting.

Chair Bunim also asked that the Committee Chairs to present at the next Board meeting their accomplishments from this current year and their goals for next year.

Public Testimony on Non Agenda Items
There was none.

Motion to adjourn was made by Victor Revenko and seconded by William Allen.
Ayes: Leamon Abrams, William Allen, Deborah Alvarez, Michael Blecker, Rosalie Bulach, Pamela Calloway, Pat Christensen, Emilio Cruz, Nicholas de Lorenzo, Theresa Feeley, Kristine Gagliardi, Linda Grohe, Jennifer Hermann, Aileen Hernandez, Curt Kirschner, Ralph Lee, Tom Lucas, Sonia Melara, Nathan Nayman, John Poremba, Victor Revenko, Darlene Rutkowski, Ave Seltsam, and Abby Snay
Nays: None
Abstentions: None
Motion passed.

The meeting was adjourned at 11:20 AM.

All written materials distributed at the meeting are posted on the Private Industry Council's website, www.picsf.org, and incorporated by reference herein.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

Cancellation Notice

The Workforce Investment San Francisco Board meeting scheduled for Wednesday, December 15, 2004 is cancelled.

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The WISF Board is scheduled to meet on
February 16, 2005
9:30 AM to 11:30 AM

The meeting location will be determined at a later date.

Thank you.

745 [illegible] Suite 200 • San Francisco, CA 94103-3228
[illegible] 415.923 [illegible] • Fax [illegible]5.923-0966
[illegible] e-mail: [illegible]
1650 [illegible]
Telephone [illegible]
TDD [illegible]

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Wednesday, March 23, 2005
Time: 10:30 a.m. – 12:30 p.m.
Location: City Hall in Room 201
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Copies of materials may be obtained from and/or reviewed at the PIC offices at both of the addresses shown below and on the PIC's website, www.picsf.org.

AGENDA APPEARS ON THE REVERSE SIDE

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(Chapter 67 of the San Francisco Administrative Code)

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To obtain a free copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Donna Hall, Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
415-554-7724
Fax: 415-554-5163
E-mail: donna_hall@ci.sf.ca.us

The Sunshine Ordinance is also available online at: www.sfgov.org/bdsupvrs/sunshine.htm

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In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.

If you require special accommodation due to a disability, contact Roberta Fazande at least 72 hours in advance at 415-923-4265,TDD 800-735-2929 (CRS) or rfazande@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; web site: sfgov.org/ethics.

Issued: Wednesday, March 16, 2005

DRAFT AGENDA
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, MARCH 23, 2005

1. Adoption of the Agenda *(Action Item)*
2. Adoption of Minutes from the Meeting held on October 20, 2004 *(Action Item)**
3. Public Testimony on Agenda Item (Discussion Item)
4. Discussion with Mayor Gavin Newsom
5. Ten *More* things to know about San Francisco (Discussion Item)*
6. Sector Spotlight: PIC/WISF Healthcare Workforce Initiatives (Discussion Item)
7. Chief of Staff Report (Discussion Item)
8. Chair's Report (Discussion Item)
9. Public Testimony on Non-Agenda Items (Discussion Item)
10. Future Agenda Items (Discussion Item)
11. Adjournment *(Action Item)*

*Information enclosed.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

Research Brief: *Ten More Things to Know About San Francisco's Economy and Employers*

A Publication to Inform
San Francisco's Workforce and Economic Development Community
March 2005

Executive Summary

This Research Brief was developed as a follow-up to an earlier report, *Research Brief: Ten Things to Know About San Francisco's Economy and Employers*, released February 2003. The original report provided a basic orientation to the size, structure, and historical evolution of San Francisco's economy and labor market. While many of the specific numbers presented in this earlier report have changed since its publication two years ago due to the 2001 economic downturn and recovery, the report's basic conclusions still hold true. For instance, San Francisco is still central to regional finance, tourism, and business services activity, among others. This report updates and delves deeper into a few topics covered previously, while also exploring several new aspects of San Francisco's economy. Throughout, emphasis is placed on aspects that make San Francisco's economy distinct.

INSIDE	Page
SF's Labor Force	*1*
Economic Activities	*6*
Economic Dynamics	*9*
Conclusions	*11*

San Francisco's Labor Force

1. With nearly half of its residents possessing a Bachelor's degree or more, San Francisco has one of the most highly educated workforces in the country.
2. San Francisco's population is concentrated in the prime working ages of 25 to 64 years old. The city has more workers per capita today as a result, but this benefit may not persist.
3. Worker attraction is particularly important for San Francisco since births contribute relatively little to population and labor force growth. San Francisco relies on large foreign immigrant inflows to balance domestic migration outflows, especially during economic downturns.
4. San Francisco's economy also draws heavily on surrounding communities – forty-four percent of San Francisco's workforce commutes in from surrounding areas while twenty-two of its employed residents commute out.
5. Commuters into San Francisco have similar education levels as San Francisco workers, but have larger families and higher incomes. San Franciscans who work outside the city have much higher education levels and smaller families.

Economic Activities: Industries and Occupations

6. Though spanning the entire range of industries, San Francisco's economy is particularly concentrated in a handful of sectors that reflect its position as a tourist and convention destination, financial and government hub, and corporate office cluster.
7. The San Francisco Bay Area remains a prominent location for corporate headquarters offices.
8. The types of jobs located in San Francisco reflect the city's industrial structure and the high education levels of its workforce. Compared with other large cities, San Francisco is home to many high-wage professional and low-wage service jobs. Moderately paid jobs in education, construction, transportation, and production are rare.

Dynamics of San Francisco's Economy

9. San Francisco's economy is much more dynamic than net job change data may suggest.
10. Turnover rates vary widely across San Francisco industries and over the course of the year.

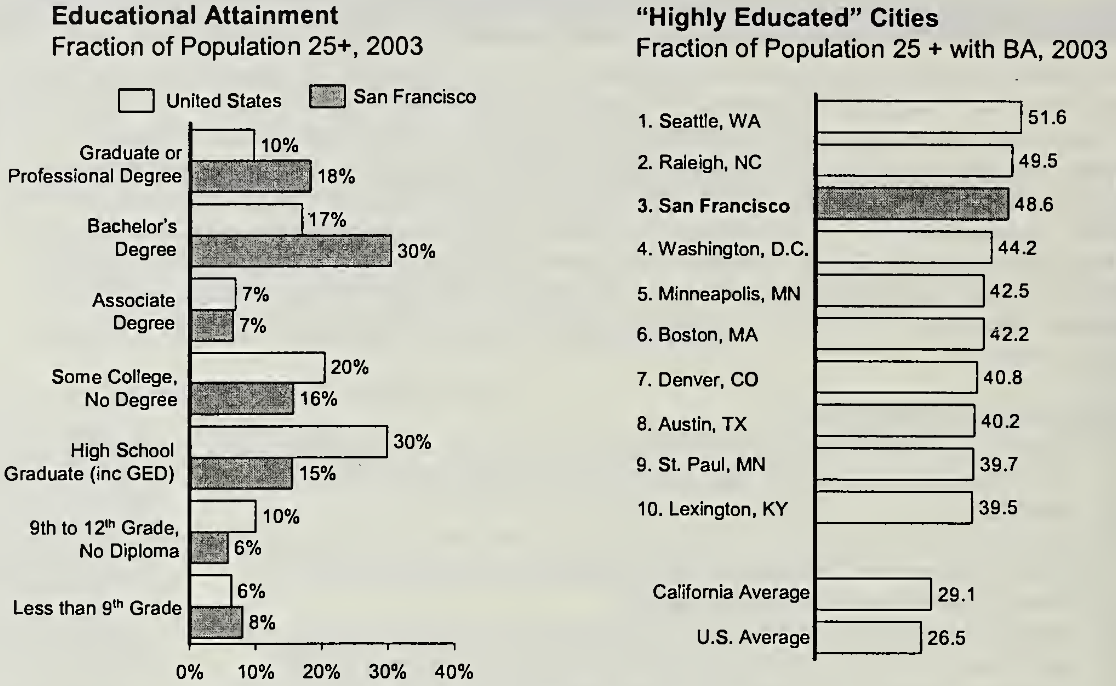
Research Briefs *are released periodically by WISF to inform the City's workforce and economic development community about short- and long-term developments in San Francisco's economy and labor market. This report, its precursor, and other research related to San Francisco's labor market, workforce development system, and economy can be found at http://www.picsf.org/research/research.htm.*

This report was written by Kevin Stange, Labor Market Research Analyst, who can be reached at kevin_stange@yahoo.com.

SAN FRANCISCO'S LABOR FORCE

1. With nearly half of its residents possessing a Bachelor's degree or more, San Francisco has one of the most highly educated workforces in the country.

FIGURE 1



Educational Attainment
Fraction of Population 25+, 2003

"Highly Educated" Cities
Fraction of Population 25 + with BA, 2003

SOURCE: U.S. Census, 2003 American Community Survey

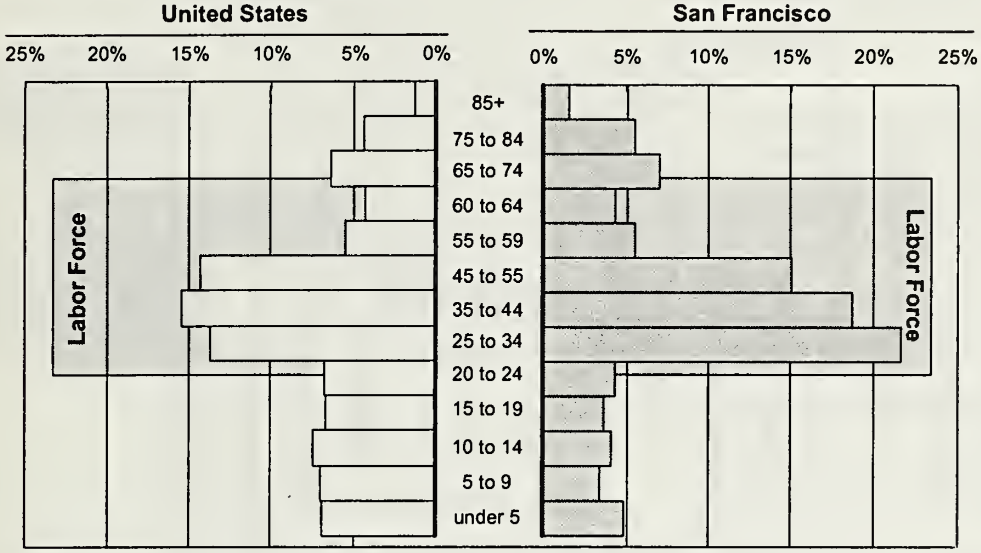
One of the most noteworthy aspects of San Francisco's economy and labor market is the extraordinarily high level of education among many San Francisco residents. The left side of Figure 1 compares the distribution of adult population by education level between San Francisco and the rest of the U.S. Compared with the U.S. overall, San Francisco has slightly more residents with very low education levels (below 9th grade), potentially a consequence of its role as home to many new immigrants who may not have had access to formal schooling abroad. Throughout the rest of the educational distribution, however, San Franciscans are better educated than their U.S. counterparts. Thirty percent of U.S. adults have exactly a high school degree, twice the fraction for San Francisco adults. At the level of Bachelor's degree, however, the roles are reversed. Thirty percent of San Franciscans have a four-year college degree, nearly double the rate for the U.S. overall. Graduate degrees are also much more common in San Francisco. Overall, nearly half of all San Francisco adults have a Bachelor's degree or higher – ranking San Francisco among the most educated cities in the U.S.

San Francisco clearly benefits from its proximity to many institutions of higher education throughout the Bay Area.

2. San Francisco's population is concentrated in the prime working ages of 25 to 64 years old. The city has more workers per capita today as a result, but this benefit may not persist.

FIGURE 2

Age Distribution
Fraction of Population in Age Group, 2003



SOURCE: U.S. Census, 2003 American Community Survey

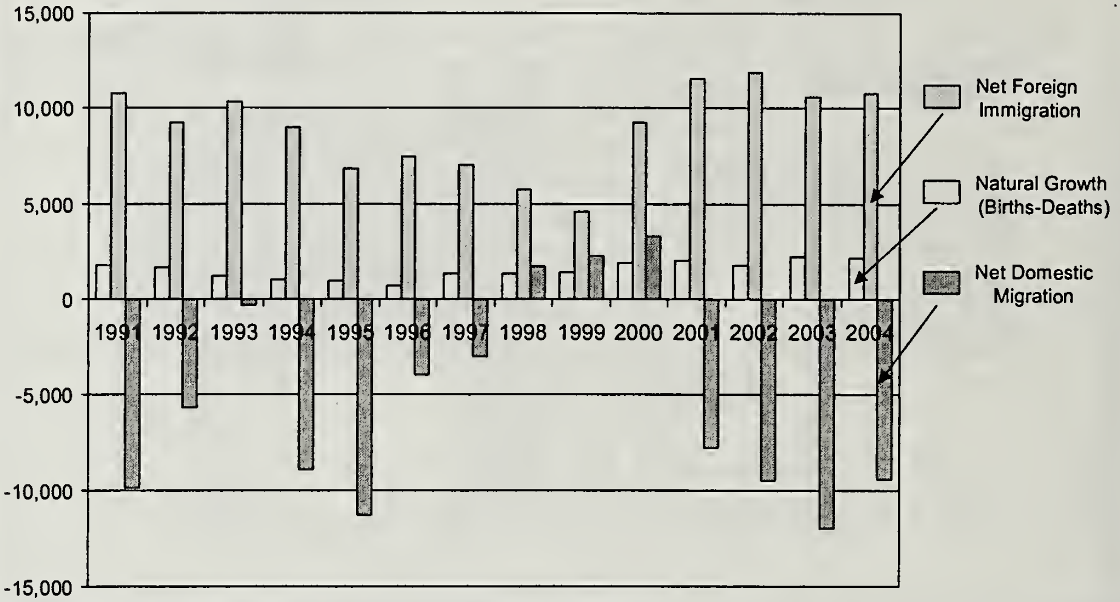
The age distribution of a city has many economic consequences. An older population has a high demand for health care, while simultaneously reducing the workforce through retirement. Younger populations require investment in education and spending on childcare (either through the market or less work by parents), but will eventually contribute to a city's workforce. As shown in Figure 2, San Francisco's population is heavily concentrated in the prime working years of 25 to 64 years old. The number of 25 to 44 year olds is particularly high – 40% of San Francisco's population, compared to just 29% for the U.S. overall. As a result, the number of workers per capita is high. The number of older San Franciscans is typical of the U.S., but San Franciscans have very few children. There are many possible reasons for this phenomenon. High housing prices or parents' preference for non-urban towns to raise children may both drive families with children away. Higher educated workers may be attracted to San Francisco for the jobs and culture, but are also more likely to have fewer children.

The economic implication of San Francisco's peculiar age structure depends on whether the current distribution is stable. Younger workers must emerge – either through natural growth (i.e. births) or migration patterns (see next section) – to replace today's working adults as they age. If the current distribution is unstable, then the current mass of working adults today will translate into relatively more retirees in future years, without a corresponding increase in workers to support them.

3. Worker attraction is particularly important for San Francisco since births contribute relatively little to population and labor force growth. San Francisco relies on large foreign immigrant inflows to balance domestic migration outflows, especially during economic downturns.

FIGURE 3

Factors Contributing to Population Growth
Net Contribution to Population Change from Previous Year,
San Francisco County



SOURCE: California Department of Finance, Demographic Research Unit

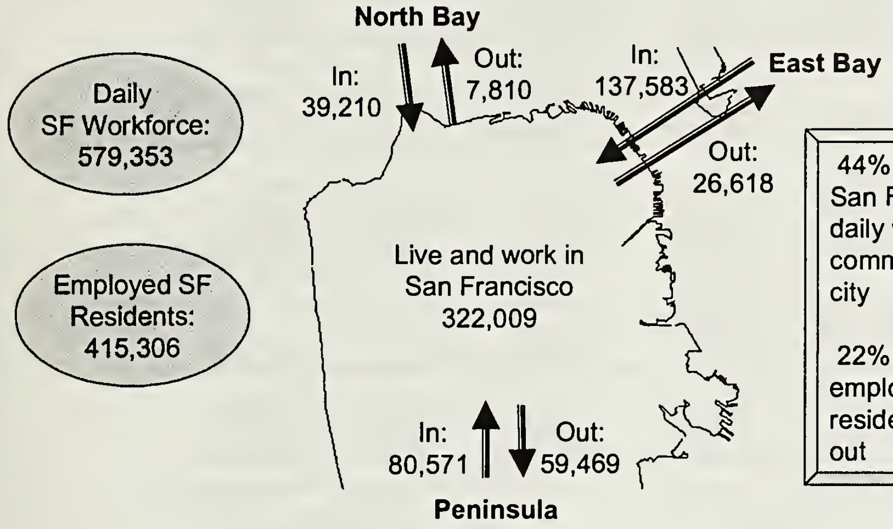
A corollary of San Francisco's peculiar age structure is that worker attraction is a particularly important means of fueling population (and thus labor force) growth over the long run. Few births mean that the contribution of natural factors to population growth is very low. Figure 3 shows how the three primary channels ("Natural" factors, foreign immigration, and domestic migration) have contributed to San Francisco's population growth over time. Each column represents the contribution of that factor to the change in population over the proceeding year. Natural growth never contributes more than a few thousand people per year to San Francisco's population. Worker movement – international and domestic – swamp all natural growth effects.

International immigration has been steadily positive and large over the last fifteen years, dropping below 5,000 only once. Net domestic migration – San Francisco residents moving elsewhere in the U.S. and visa versa – has been mostly negative and more responsive to aggregate economic conditions. San Francisco actually became a net recipient of domestic movers in the final years of the recent economic expansion. This analysis underscores the importance of worker attraction to continued population, labor force, and economic growth.

4. San Francisco's economy also draws heavily on surrounding communities – forty-four percent of San Francisco's workforce commutes in from surrounding areas while twenty-two of its employed residents commute out.

FIGURE 4

Daily commuters to and from San Francisco
Number of workers, 2000


North Bay
In: 39,210
Out: 7,810
In: 137,583
East Bay
Out: 26,618
Daily SF Workforce: 579,353
Employed SF Residents: 415,306
Live and work in San Francisco 322,009
In: 80,571
Out: 59,469
Peninsula

44% (257,344) of San Francisco's daily work force commutes into the city

22% (93,279) of employed SF residents commute out

NOTE: Totals exclude commuters to/from other states and other regions of California. Both of these account for less than one percent of all commuters.
SOURCE: U.S. Census Bureau Residence County to Workplace County Files from 2000 Census. Replaces previous estimates which were based on population projections and 1990 Census data.

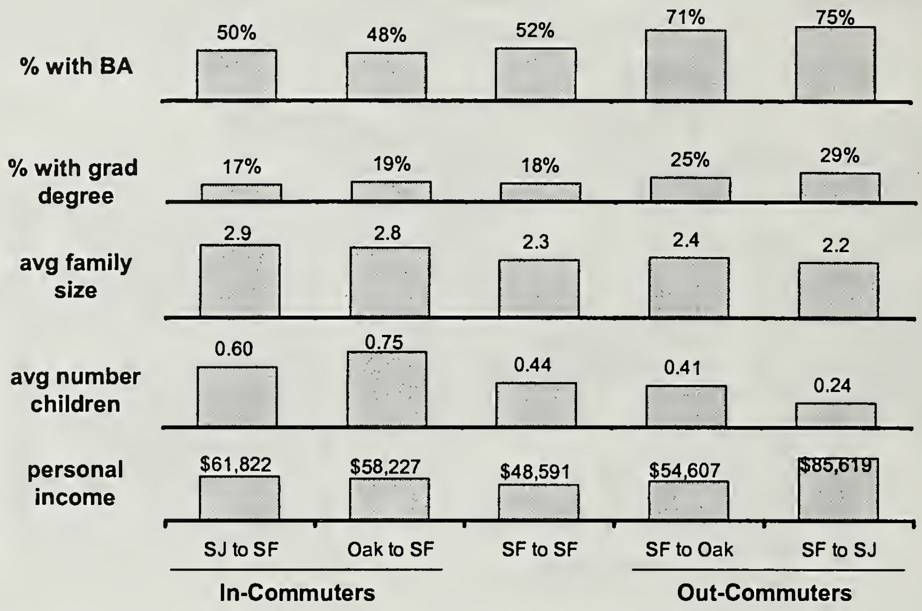
In the earlier report, I stressed the labor market integration interpretation of the high number of San Francisco-bound commuters. The presence of a shared labor force is one strong indicator of the economic interdependence and integration between the city of San Francisco and the surrounding Bay Area. Figure 4 updates my earlier estimates of the extent of a shared labor force with new data from the 2000 Census and reaches similar conclusions. Forty-four percent of San Francisco's workforce commutes into jobs from outside the city, while hardly more than half of the city's workers actually live within the city limits. Nearly 140,000 San Francisco workers (24% of the total) commute daily from the East Bay alone. Marin County and north accounts for another 7%, while the Peninsula adds another 14%.

Reverse commuters – city residents that work outside of the city – account for 22% of the city's employed residents. Silicon Valley on the Peninsula is the primary destination for San Francisco residents who work outside of the city, attracting nearly 60,000 reverse commuters a day. It should be noted that 2000 was a particularly strong year for the Silicon Valley economy. It is likely that the extent of Southward commuting among San Francisco residents has slowed somewhat since the 2000 Census was conducted.

5. Commuters into San Francisco have similar education levels as San Francisco workers, but have larger families and higher incomes. San Franciscans who work outside the city have much higher education levels and smaller families.

FIGURE 5

Characteristics of San Francisco Commuters, 2000



SOURCE: Author's tabulations from 2000 U.S.Census 1% Public Use Micro Sample

Figure 5 describes contrasts San Francisco commuters along several dimensions: education level, family size and number of children, and income. Educationally, in-commuters are similar to San Francisco residents, but do appear to have a preference for larger families and more children. In-commuters' personal income is also higher, possibly to compensate for their higher familial commitments.

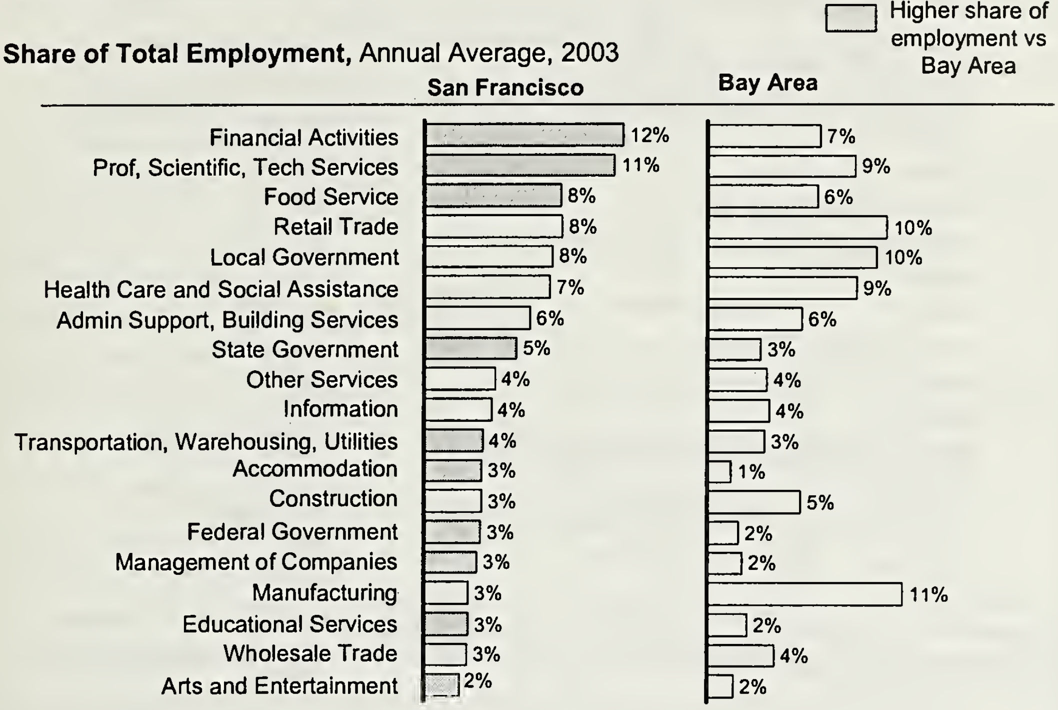
Out-commuters are noticeably different than other San Francisco workers. Workers who commute to jobs in Oakland and San Jose from San Francisco are quite a bit more educated than non-commuters – more than one quarter of out-commuters have advanced degrees. Commuters to San Jose also have much higher personal income and smaller family size than non-commuters.

ECONOMIC ACTIVITIES: INDUSTRIES AND OCCUPATIONS

6. Though spanning the entire range of industries, San Francisco's economy is particularly concentrated in a handful of sectors that reflect its position as a tourist and convention destination, financial and government hub, and corporate office cluster.

FIGURE 6

Share of Total Employment, Annual Average, 2003



NOTE: Excludes Farming, Natural Resources, and Mining
SOURCE: US Bureau of Labor Statistics Current Employment Statistics program

San Francisco businesses span all most industries – from banking and legal services to manufacturing and construction. However, San Francisco employment is particularly concentrated in a handful of industries that make San Francisco distinct. Figure 6 presents the fraction of total employment in each broad industry for San Francisco and the nine-county San Francisco Bay Area. Financial and professional (IT, legal, accounting, etc) service employment is substantial, accounting for 12% and 11% of all San Francisco employment, respectively.[1] San Francisco is also a hub for non-local (State and Federal) government administration. Together these industries account for 8% of all San Francisco employment, compared with 5% for the entire Bay Area. San Francisco's tourism sector is apparent in the above-average employment share in accommodation, arts and entertainment, and transportation.

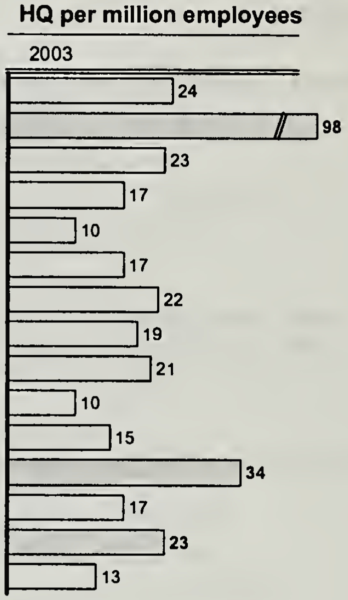
---

[1] These figures use the North American Industrial Classification System (NAICS) for categorizing establishments and employment by industry. My earlier report utilized the Standard Industrial Classification (SIC) system, which has been phased out. While similar for many industries, the two classification systems are not entirely comparable. For instance, retail and restaurants have been separated in NAICS and the Information industry also new with NAICS.

7. The San Francisco Bay Area remains a prominent location for corporate headquarters offices.

FIGURE 7

Metro Areas With Most Public Firm Headquarters



	Public HQ Rank (by total number)				**HQ per million employees**
	1990	1995	2000	2003	2003
New York, NY	1	1	1	1	24
San Jose, CA	**10**	**7**	**2**	**2**	98
Boston, MA-NH	4	3	3	3	23
Chicago, IL	3	4	4	4	17
Los Angeles-Long Beach, CA	2	2	5	5	10
Philadelphia, PA-NJ	5	9	8	6	17
Houston, TX	9	6	6	7	22
Dallas, TX	6	8	7	8	19
Minneapolis-St. Paul, MN-WI	7	5	9	9	21
Washington, DC-MD-VA-WV	13	14	11	10	10
Atlanta, GA	14	11	12	11	15
San Francisco, CA	**18**	**16**	**10**	**12**	34
Orange County, CA	12	13	14	13	17
Oakland, CA	**27**	**17**	**17**	**14**	23
San Diego, CA	22	15	16	15	13

NOTE: Approximately 5000 Active Public US Companies are contained in the database.
SOURCE: Authors analysis of Compact Disclosure Database, published by Thomson Financial. Total employment from U.S. Bureau of Labor Statistics

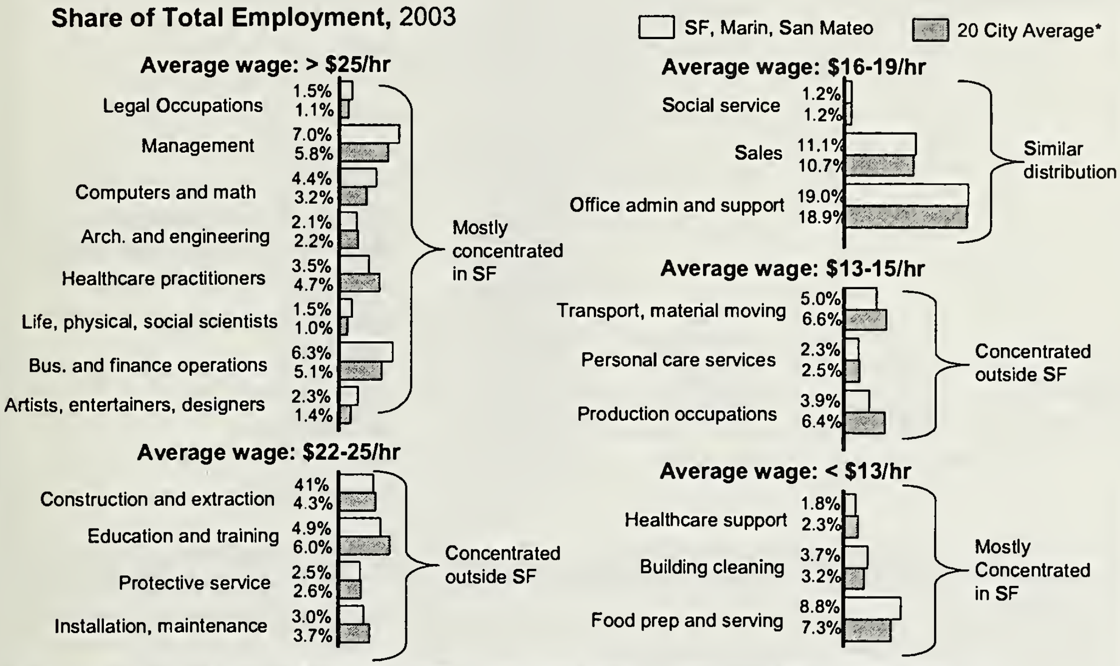
San Francisco has been home to a long line of companies dating back to the 19th century. The prolonged economic expansion of the late 1990's brought new Bay Area companies to prominence and new public company headquarters to San Francisco and the rest of the Bay Area. As depicted in Figure 7, San Francisco rose from 18th in public HQ presence in 1990 to 10th at the height of the boom. Today, San Francisco is steady at 12th. San Jose and Oakland have shown remarkable improvements as well – New York aside, San Jose is now home to more public companies than any other city. Dividing the number of corporate headquarters by employment or population provides a better measure of the prevalence of corporate headquarters in a local economy. Due strictly to its size, New York should be expected to have more corporate offices than other cities. As measured by the number of corporate headquarters per million workers, San Jose, San Francisco, and Oakland stand out. These Bay Area cities have the highest HQ concentration among all cities ranked in the top 15 by number of HQ offices.

Companies often bring jobs (directly and indirectly), tax revenues, and corporate philanthropy to the cities they chose to locate in.

---

8. The types of jobs located in San Francisco reflect the city's industrial structure and the high education levels of its workforce. Compared with other large cities, San Francisco is home to many high-wage professional and low-wage service jobs. Moderately-paid jobs in education, construction, transportation, and production are rare.

FIGURE 8


Share of Total Employment, 2003

Note: Occupational categories are listed in descending order from highest to lowest average wage in SF MSA in 2000.
* Comparison cities include: Atlanta, Austin, Boston, Chicago, Dallas, Denver, Detroit, Houston, Los Angeles, Miami, Minneapolis, New York, Newark, Philadelphia, Phoenix, Portland, Saint Louis, Seattle, San Francisco, and Washington, DC.
SOURCE: US Bureau of Labor Statistics Occupational Employment Statistics Survey

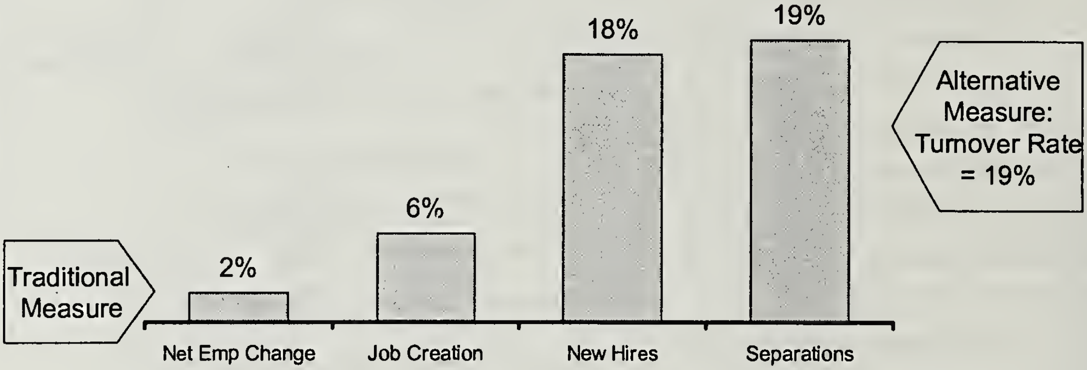
The type of jobs located in San Francisco is dictated by the city's industrial distribution and by firms' operational decisions about where to conduct the various activities of their business. As the home of many corporate headquarters, financial institutions, and professional services firms, San Francisco naturally employs many highly paid lawyers, managers, computer scientists, and business operations professionals. My earlier report showed that San Francisco did indeed employ more of these types of workers by comparing the city's occupational structure to that of the Bay Area overall. I found that these same industries also require a sizeable workforce of moderately paid sales and office support professionals and a large pool of building cleaners and food service workers. Figure 8 repeats this analysis but with a different comparison group. I constructed a hypothetical occupational distribution for an average city, by combining the occupational distributions of twenty large cities (described in Figure 8). I reach a similar conclusion. Even compared to other large, comparable cities, San Francisco employs relatively more very well-paid professionals and very low-paid building cleaning and food service workers. San Francisco employs approximately the same share of office and sales workers as the 20-city average.

DYNAMICS OF SAN FRANCISCO'S ECONOMY

9. San Francisco's economy is much more dynamic than net job change data may suggest.

FIGURE 9

Alternative Measures of Economic Activity,
Fraction of Total Employment at Start of 3rd Quarter 2003
San Francisco County



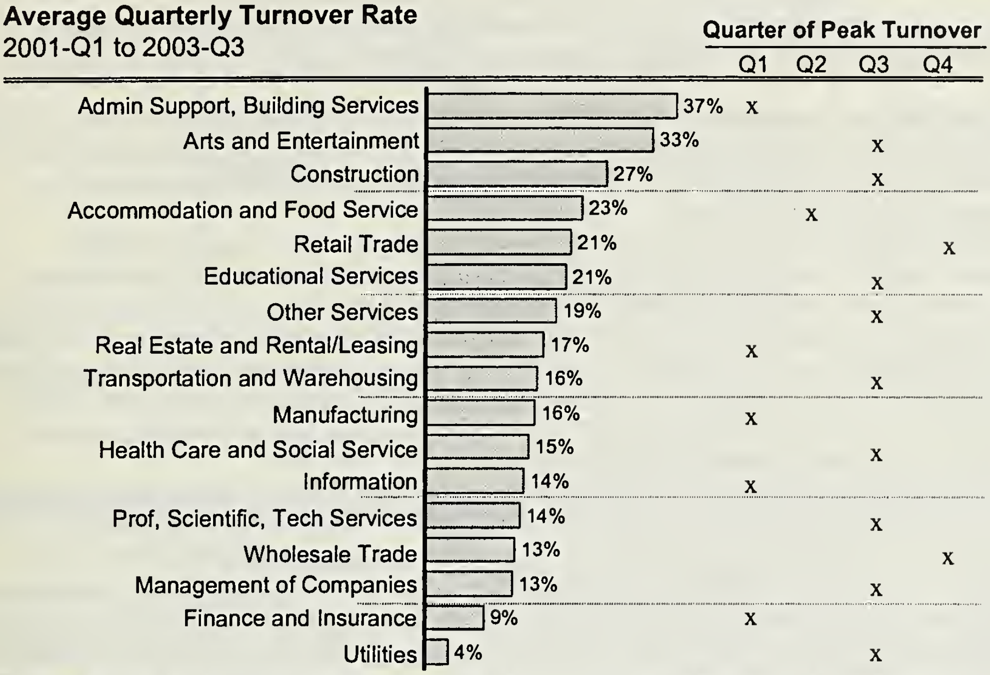
NOTE: In this analysis I have calculated the turnover rate as TR = ½ x (New Hires + Separations)/(Total Employment). Various measures of new hires and total employment will generate numerically different but conceptually similar estimates of the turnover rate.
SOURCE: *Quarterly Workforce Indicators Report* from California Employment Development Department and the Local Employment Dynamics program at the U.S. Census Bureau.

Traditionally, analysts have focused on the net employment change as the primary indicator of economic activity in an industry or locale. The reason for this focus is straight-forward: the data is easy to collect. Net employment change is simply the difference between current and past employment. Recent data suggests that this measure grossly understates the amount of economic activity (such as job displacement) that is occurring in an economy. From the second to third quarter of 2003, for instance, employment in San Francisco grew by two percent according to administrative records. This moderate net increase masks the extent of job growth and loss experienced by individual employers and workers. Among new or existing firms who increased employment, 6% new jobs were created in the aggregate. Among firms who downsized or went out of business, aggregate employment declined by 4%. From the worker perspective, the job market is even more tumultuous. Firms hired the equivalent of nearly twenty percent of their initial workforce over the course of the quarter. A similar number of workers were separated (quit or fired) from their job over the quarter. A better measure of the amount of labor market activity faced by a worker is the turnover rate, defined as TR = ½ x (New Hires + Separations)/(Total Employment). If all workers were separated from their job and hired back at a new firm within the quarter, the turnover rate would be 100%. Figure 9 suggests that traditional measures using net employment change grossly understate the economic activity faced by individual firms and workers.

10. Turnover rates vary widely across San Francisco industries and over the course of the year.

FIGURE 10

Average Quarterly Turnover Rate
2001-Q1 to 2003-Q3



NOTE: In this analysis I have calculated the turnover rate as TR = ½ x (New Hires + Separations)/(Total Employment).
SOURCE: *Quarterly Workforce Indicators Report* from California Employment Development Department and the Local Employment Dynamics program at the U.S. Census Bureau.

The amount of "churn" in San Francisco's economy, as measured by the turnover rate, varies tremendously across industries. Unsurprisingly, administrative support (which includes employment services) has the highest rate of turnover, replacing more than a third of their workforce quarterly. Figure 10 charts the average turnover rate (calculated over 2001 to 2003) for each major industry in San Francisco. Disregarding employment agencies, there are still five industries with rates of turnover greater than 20%. Accommodation and food service, construction, arts and entertainment, retail trade, and educational services all replace one fifth of their workforce every quarter. Industries with high turnover rates are good candidates for workforce development efforts. High turnover reflects either numerous separations (requiring retaining and placement for workers) or many new hires (requiring training or screening services for employers).

Turnover patterns can also be used to prioritize workforce development resources over time. As Figure 10 indicates, many industries reach peak turnover in the third quarter of the year. San Francisco's office-heavy industries such as Finance, Information, and Administrative support, by contrast should be dealt with earlier in the year. Retail and wholesale trade, by contrast, appear to need the most assistance during the holiday season.

Conclusions and Recommendations

This report provides updated data for a few topics discussed in the previous paper including San Francisco's occupational distribution, industry structure, and commute patterns. More importantly this report also discusses some of the dynamics underlying changes in San Francisco's labor force, commute patterns, and industry structure.

There are several policy implications of the picture of San Francisco's economy painted in this and the earlier report. Below, I repeat one implication from the previous report and also offer two more.

1. **Importance of regionalism**. San Francisco is far from a closed economy. San Francisco employers tap the entire Bay Area for their workforce and many residents work outside the city. A regional approach to economic and workforce development planning is essential to its effectiveness.
2. **Worker attraction and housing**. San Francisco's age structure and low fertility underscore the importance of worker attraction to meeting future workforce needs. Currently, San Francisco obtains much of its working-aged labor force abroad (through immigration), from other states (domestic migration), and from surrounding communities (commuting). The city's ability to meet future workforce needs depends on its ability to continue to do so. Implicit in several of the phenomenon studied herein (commuting, domestic migration, HQ location) is the centrality of real estate and housing prices to families' and firms' location decisions.
3. **Job creation, destruction, and internal growth**. The disconnect between net and gross measures of economic activity (e.g. net employment change vs. job creation) demonstrates how important economic information (important to policy-makers or job-seekers, for instance) can be easily lost. Often within stagnant or declining industries, many firms are creating jobs and hiring workers. Their success is often masked by the failure of their peers so they are treated with a one-size-fits-all (in an industry) response. Policy should not neglect these successful businesses by courting mediocre businesses in a growing industry. Helping successful local businesses grow is the easiest way to ensure that San Francisco retains its prominence as a corporate headquarters location.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A SPECIAL PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date: Thursday, May 5, 2005
Time: 9:00 a.m. – 1:00 p.m.
Location: Bill Graham Civic Auditorium
99 Grove Street
4th Floor, Room 415
San Francisco, CA 94102

Copies of materials may be obtained from and/or reviewed at the PIC office at the address shown below and on the PIC's website: http://www.picsf.org

AGENDA APPEARS ON THE REVERSE SIDE

Know Your Rights Under the Sunshine Ordinance

(Chapter 67 of the San Francisco Administrative Code)

Government's duty is to serve the public, reaching its decisions in full view of the public. Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance assures that deliberations are conducted before the people and that City operations are open to the people's review. For more information on your rights under the Sunshine Ordinance or to report a violation of the ordinance, contact the Sunshine Ordinance Task Force.

4
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ecial

To obtain a copy of the City's Sunshine Ordinance or to report a suspected violation, contact:

Adele Destro, Interim Administrator
Sunshine Ordinance Task Force
City Hall, Room 244
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4683
Phone: (415) 554-7724
Fax: (415) 554-5163
Email: sotf@sfgov.org

The Sunshine Ordinance is available online at: http://www.sfgov.org/site/sunshine_index.asp?id=4673

Other Accommodations

In order to assist the City's efforts to accommodate persons with severe allergies, environmental illnesses, multiple chemical sensitivity or related disabilities, attendees at public meetings are reminded that other attendees may be sensitive to various chemical based products. Please help the City accommodate these individuals.-

If you require special accommodation due to a disability, contact Cynthia Vasquez at least 72 hours in advance at 415-923-4464,TDD 800-735-2929 (CRS) or cvasque@picsf.org

Lobbyist Registration and Reporting Requirements

Individuals and entities that influence or attempt to influence local legislative or administrative action may be required by the San Francisco Lobbyist Ordinance (SF Campaign & Governmental Conduct Code § 2.100) to register and report lobbying activity. For more information about the Lobbyist Ordinance, please contact the San Francisco Ethics Commission at 30 Van Ness Avenue, Suite 3900, San Francisco, CA 94102; telephone (415) 581-2300; fax (415) 581-2317; website: http://www.sfgov.org/ethics

Issued: Monday, May 02, 2005

PROPOSED AGENDA
SPECIAL MEETING OF THE WISF BOARD
THURSDAY, MAY 5, 2005

1. Adoption of the Agenda *(Action Item)*
2. Public Testimony of Agenda Items (Discussion Item)
3. Closed Session Pursuant to Government Code § 54957 San Francisco Administrative Code § 67.10(e):
   a. Instructions to designated representatives regarding matter within the scope of labor negotiations
   b. Personnel Issues
4. Reconvene in open session
   a. Vote to elect whether to disclose any or all discussions held in closed session (S.F. Adm. C. §67.12(a).) (*Action Item*)
   b. Possible report on actions taken in closed session (Govt C.§54957.1(a)(2) and (S.F. Adm. C.§67.12(b)(2).) (*Action Item*)
5. Separation of PIC and WISF Boards (Discussion Item)
6. Public Testimony on Non-Agenda Items (Discussion Item)
7. Future Agenda Items (Discussion Item)
8. Adjournment *(Action Item)*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date:	Tuesday, June 28, 2005
Time:	9:30 a.m. – 11:30 a.m.
Location:	Bill Graham Civic Auditorium 99 Grove Street 4th Floor, Room 415 San Francisco, CA 94102

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8/05

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Issued: Wednesday, June 22, 2005

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org
TDD 800.735.2929 (CRS)

PROPOSED AGENDA
MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
TUESDAY, JUNE 28, 2005

Public Testimony will be taken throughout the meeting

1. Adoption of the Agenda *(Action Item)*

2. Adoption of minutes from the meeting held on March 23, 2005 (*Action Item*)*

3. Sector Spotlight: PIC/WISF Healthcare Workforce Initiatives (Discussion Item)

4. Workforce and Economic Development: Policy priorities for San Francisco (Discussion Item)

5. Consent Calendar *(Action Item)*

All items on the Consent Calendar are handled through a single vote. Each Workforce Investment Board Member shall be entitled to affirm the action, oppose the action, or refer the action back to committee for further consideration (Bylaws of Workforce Investment San Francisco, Section 7.2). The Consent Calendar is adopted by affirmative vote of a majority of the Members present and voting at the meeting (a majority of the required quorum).

   a. Proposed Action: Ratification of PIC Retirement Plan for January – June, 2005 **
   b. Proposed Action: Ratification to renew the Professional Services contract for the Hope House Program**
   c. Proposed Action: Ratification to submit Grant Applications to the Mayor's Office of Community Development (MOCD) **
   d. Proposed Action: Ratification for an RFP design to Expand WIA Adult Services for PY 2005-2006**
   e. Proposed Action: Ratification for solicitation for services to complete a YO!SF Impact Study and Audio/Visual Report**
   f. Proposed Action: Ratification for WIA Formula Youth Program Evaluation Process, Criteria and Tools* *
   g. Proposed Action: Ratification of the Mayor's decision to separate the governing boards of PIC, Inc. and WISF Board*
   h. Proposed Action: Ratification of Strategic Policy Priorities for Investment Funding **

6. Executive Committee Recommendations (*Action Items*)*
   a. Proposed Action: Approval of an expenditure plan for unspent Federal Fiscal Year (FFY) 2003 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) formula funds**
   b. Proposed Action: Approval of customized Training Funding to the San Francisco Chamber of Commerce to operate the Legal Skills Training and Advancement Resources (STAR) project**
7. Workforce Investment Act (WIA) Formula Youth Program Funding Recommendations (*Action Item*)**

8. President's Report (Discussion Item)

9. Chair's Report (Discussion Item)
10. Public Testimony on Non-Agenda Items (Discussion Item)

11. Future Agenda Items (Discussion Item)

12. Adjournment *(Action Item)*

*Information to follow
**Information enclosed

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 10, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: PIC RETIREMENT PLAN (Agenda Item 5a)

On or about November 15th of each year, the Executive Committee of the Workforce Investment San Francisco Board reviewed the retirement contribution rate of the Private Industry Council of San Francisco, Inc. (PIC) to determine the rate of contribution for the upcoming Plan year.

Agenda Item 5A is an action item. The PIC Retirement Plan is a 403(b) defined contribution annuity plan that became effective on February 1, 1995. PIC employees become participants of the plan after they have completed two years of service and have attained age 21. The PIC currently contributes an amount equal to 6% of the participant's salary. For Program Year 03-04, the PIC contributed $248,194 to the Plan. The annual projected cost for the PIC's contribution for Program Year 04-05 is estimated to be $300,000.

Staff proposed that the PIC continue to contribute to the Plan at the 6% rate **for six months (January 2005 to June 2005)**. This proposal for six months of funding (rather than twelve) is made in light of current revenue projections for the Program Year that begins July 1, 2005. Attached is the resolution necessary for the continuation of retirement contributions. The Finance Subcommittee adopted the Staff recommendation at its meeting on November 23, 2004.

Please contact Roberta Fazande at 415-923-4265 if you have questions. Staff will also be present at your meeting to answer any questions.

Attachment

cc: PIC staff

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JANUARY 14, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: HOPE HOUSE PROFESSIONAL SERVICES CONTRACT (AGENDA ITEM 5b)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve the renewal of the Professional Services contract for the Hope House program.

AVAILABLE FUNDS

The U.S. Department of Labor, Office of Disability Employment Policy extended the Hope House grant for a second year from Sept. 30, 2004 – Sept. 29, 2005, in the amount of $624,824. PIC has budgeted $25,000 for the renewal of the Professional Services contract.

BACKGROUND

In December 2003, the Executive Committee approved a competitive solicitation for a $25,000 professional services contract to facilitate the goals outlined in the Hope House proposal and funded by the DOL grant. Three proposals were received. PIC Staff recommended and the Executive Committee approved RDJ Enterprises, Inc.

By April 2004 RDJ Enterprises, Inc, Principal, Dwayne Jones, had accepted a position with the City and on June 1, 2004 his consulting firm was sold to Clear Focus Coaching, Inc., thereby assigning all rights and prospective benefits it would have received and delegating all responsibilities to Clear Focus Coaching, Inc. Clear Focus Coaching, Inc. assumed all duties, obligations and responsibilities that RDJ Enterprise would have assumed under that proposed agreement.

FY 2003 - 2004 PROGRAM PERFORMANCE

The five year Hope House pilot program funded by the U.S. Department of Labor, Office of Disability Employment Policy has three primary goals, which were set forth in the July 2003 proposal and support the U.S. Department of Housing and Urban Development (HUD) companion grant which provides permanent supported housing for 70 chronically homeless individuals with disabilities.

Hope House goals relevant to the Professional Services contract are:

1. Establish a culture of “Vocationalized” living within the permanent housing;
2. Initiate Customized Employment strategies in the One Stop system by placing 42 in employment within 12 months of move-in; and engage 49 in employment activities.
3. Create ‘system change’ that establishes coordination of existing and new workforce development system resources to serve the chronically homeless in San Francisco.

Hope House began placing individuals in scattered site houses in June 2004. On Dec. 31, 2004 thirty-three (33) chronically homeless adults with disabilities reside in 14 houses in the Bayview-Hunters Point area of San Francisco. Nine (9) individuals are currently employed while 28 are registered and 23 have completed assessment and developed employment plans through customized employment services at the Southeast One Stop Career Link.

RECOMMENDATION

Staff recommends the renewal of the Professional Services contract with Clear Focus Coaching, Inc. The original solicitation did not prohibit a contract renewal, and the scope of work completed by Clear Focus Coaching, Inc. in Year One and the first months of Year Two was completed satisfactorily and requires additional follow-up and coordination due to issues of capacity and staff turnover within partner agencies. Further procedure development and collaboration is necessary to produce the quantitative outcomes required in the grant.

Clear Focus Coaching Inc., due to its familiarity with the Hope House Program, partner and stakeholder agency roles and responsibilities, and having already completed a number of coordination tasks, will provide the necessary continuity and knowledge of factors effecting Hope House program goals and outcomes. They will work from this knowledge base to further strengthen the collaboration between partners and stakeholders, develop operations and procedures that link Hope House residents to existing supportive services for which they are eligible, and pilot customized employment strategies all of which initiate the system change in a manner that provides the Department of Labor with quantifiable results.

The scope of work completed by Clear Focus Coaching, Inc. involved developing collaboration between Hope House partners United Council of Human Services, Young Community Developers and the Southeast One Stop Career Link; assisting in developing linkages to resources for which Hope House residents are eligible; gaining commitments of stakeholders/mainstream providers; and providing technical assistance in piloting customized employment best practices through the One Stop. These tasks are in their initial stages.

Staff will be available at your January 24th meeting to answer any questions you may have. Please feel free to contact Zelda Saeli at 415-923-4256 if you have questions before the meeting.

cc: Clear Focus Coaching, Inc.
Hope House Partners
DHS, PIC Staff

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE**: JANUARY 14, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: AUTHORIZATION TO SUBMIT GRANT APPLICATIONS TO THE MAYOR'S OFFICE OF COMMUNITY DEVELOPMENT (MOCD) (AGENDA ITEM 5c)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to authorize the submission of two grant applications to MOCD.

BACKGROUND

On December 15, 2004, the Mayor's Office of Community Development and Mayor's Office of Housing issued a Request for Proposals (RFP) for the 2005-06 Community Development Block Grant (CDBG) and Emergency Shelter Grant (ESG) programs.

The seven grant areas of the CDBG and ESG solicitation are:

- Capital Projects: Existing Facilities
- Capital Projects: New Facilities
- Capital Projects: Public Space Improvements
- Economic Development
- Planning and Capacity Building
- Public Services
- Emergency Shelter Grant

Proposals are due by 8:00 p.m., Thursday, January 27, 2005.

RECOMMENDATION

Staff requests authorization to submit two grant applications for the following:

1. The Enterprise Zone Vouchering Project, under the Economic Development grant area; and
2. The PIC Information Technology Consortium-Glide Partnership, under the Public Services grant area.

Brief proposal summaries are attached for your information, and staff will be available at your January 24th meeting to answer any questions you may have. Please feel free to contact Joel Streicker at 415-923-4274 if you have questions before the meeting.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** FEBRUARY 17, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: RFP DESIGN TO EXPAND WORKFORCE INVESTMENT ACT (WIA) SERVICES, 2005-06 (AGENDA ITEM #5d)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve a solicitation design for Adult services to be funded by the Workforce Investment Act (WIA) in the year beginning July 1, 2005 (PY'05). The services solicited will be available, along with or instead of current WIA-funded activities, for use by a new WIB, should such services be desired. Without a solicitation, the new WIB's choices are limited to proposals originally solicited in 2003.

BACKGROUND

The One Stop Services, Employer Services and Program Resources Committees have each articulated a recommendation to improve the WIA-funded adult service delivery system. Since the Executive Committee has taken on the responsibilities and functions of WISF Committees (except the Youth Council which is required by statute) until Mayor Newsom appoints (or reappoints) WISF Board members, it will complete design and solicitation responsibility for the two adult programs — Adult and Dislocated Worker. In light of the work to date of the Program Resources Committee, the Employer Services Committee's desire to increase employer-directed customized training, and the continuing development of the One Stop System, staff recommends that you solicit and make available for use a range of added services from which a new WIB may select to invest the WIA adult formula dollars in PY05-06.

As described at your meeting of January 24, 2005, the Staff proposes to conduct a Request for Proposal (RFP) solicitation in several general areas of workforce development for the year beginning in July 2005. WIA provides performance goals for Adult and Dislocated Worker services, and overall past performance has been excellent, exceeding goals in most all categories except for Dislocated Worker Wage Replacement Rate at 6 months.

ACTIVITIES TO BE SOLICITED

While none of the proposed services may be desired or funded by the new WIB, the Staff recommends choices in the following areas:

1. **Assessment Services.**
   Assessment of job-seeker aptitudes, skills, interests, and needs is an essential building block of WIA's customer choice foundation. Currently, assessment services are varied, limited, and not standardized in the One Stop System (OSS). In-depth independent, standardized assessments are not available as an intensive service through the OSS for the general public who may need them. The OSS needs an assessment provider that does not have a referral conflict of interest; that will not offer other intensive services or operate training programs itself funded with WIA Adult dollars. In addition, the provider must have the capacity and experience to:

   - Provide in-depth applicant assessment to determine need for (additional) intensive, training, and supportive services, as defined by WIA.
   - Develop individualized employment plans for those assessed.
   - Make appropriate referrals to needed services (funded by WIA and with other sources);
   - Track those referred to WIA-funded services through enrollment in those services.

   The assessment provider must have capacity and desire to work with a wide variety of applicants, including those with limited English, those who were or are homeless, older persons, refugees and asylees, mentally or physically disabled persons, veterans, and ex-offenders. The size of the assessment caseload will be determined by the amount of WIA funds allocated for this activity (for purposes of this RFP). In order for this assessment activity to be fully developed for all San Franciscans who need it, not only those enrolled under WIA, the workforce system will need to supply additional funds and/or resources. The goal for this activity will be to have a central tool with portable results: To have a job seeker be assessed only once and have the results applicable to and available to any and all subsequent service providers. Staff recommends that training providers, in order to receive WIA Adult funds, be required to recognize this centralized assessment as the access point to training services.

2. **Intensive Services (other than in-depth assessment and development of IEP)**
   Currently, the OSS does not provide a full array of stand-alone intensive services to those in the general (low income) public who may need them. Intensive services are provided in concert with some but not all, vocational training. Because some providers do not include case management, counseling and job placement along with their training (e.g., community colleges), a vendor or vendors of such wrap-around services is needed. Examples of services to be solicited include:

- Short-term pre-vocational services and assistance, such as counseling and career guidance, case management, individualized job readiness and soft-skills; life skills, such as money management, time management, hygiene and work attire information. These services could be constructed to stand alone and be provided to customers who will not need subsequent training or be developed to complement and wrap around separate vocational training, deemed necessary by independent assessment staff. Stand-alone intensive services' programs will be expected to meet local WIA performance goals and outcomes.
- Intensive Service providers must have the capacity and desire to work with a wide variety of applicants, including those with limited English, those who were or are homeless, older persons, refugees and asylees, mentally or physically disabled persons, veterans, and ex-offenders. **The solicitation would be for an entity that can provide services for all of these various customers, not just for one segment of the San Francisco job seeker population.**
- Intensive Service providers must establish close linkages with assessment services staff, vocational training providers, and the OSS, and be centrally located and ADA-accessible to all San Franciscans. Ideally, intensive services would be provided in the OSS Centers.
- Intensive Service providers will accept customers referred to them by independent assessment staff, and may be required to recruit customers.
- Intensive Service providers may be required to track customers and provide retention and follow up services for one year following the provision of intensive services.
- The size of the Intensive Services caseload and breath of services available will depend on the amount of WIA funds allocated to intensive services by the WISF Board. In order for intensive services to be fully developed for the low-income population in general, not only those enrolled under WIA, the workforce system will need to supply additional funds and/or resources. The additional intensive services to be solicited in an RFP are meant to complement and expand the intensive services (workshops, etc.) currently being provided through the OSS Partners at the One Stop Centers.

3. On-the-Job Training (OJT) Broker

Currently in San Francisco WIA funds OJTs only for certain special populations. There are no WIA-funded mechanisms to develop OJTs for low-income job seekers in general. It is recommended that services be expanded and an entity be solicited to broker OJTs for the general population of low-income residents. Examples of services include:

- Recruit and serve a wide variety of applicants, including those with limited English, those who were or are homeless, older persons, refugees and asylees, mentally or physically disabled persons, veterans, and ex-offenders. **The solicitation would be for an entity that can develop OJTs for all of these various customers, not just for one segment of the San Francisco job seeker population.**

- Working closely with the City and Partner Business Services Representatives, the OSS Centers' Business Services, and other collaborations and consortia (Information Technology Consortium, etc.), recruit and serve a wide variety of employers, developing OJT contracts with employers funded by WIA. Ideally, OJT brokerage services would be provided in the OSS Centers.
- The size of the OJT caseload will depend on the amount of WIA funds allocated to this activity by the WISF Board. In order for OJTs to be available to all low-income job seekers who need it and employers who would like to take part in this collaboration, the workforce system will need to supply additional funds and/or resources other than WIA.

4. Customized Training

According to the WIA, the term "customized training" means training--

a. that is designed to meet the special requirements of an employer (including a group of employers);
b. that is conducted with a commitment by the employer to employ an individual on successful completion of the training; and
c. for which the employer pays for not less than 50 percent of the cost of the training.

Realizing that all employers will not know their future training needs at the precise time that an RFP is issued, staff suggests soliciting employers who need customized training now, and depending on the response and need, issuing subsequent solicitations as funds and time allow throughout the program year. Staff recommends that a point person be hired to develop and maintain a robust customized training (CT) pilot program.

- Working closely with the City and Partner Business Services Representatives and the OS Centers' other business services, the point person would recruit and serve a wide variety of employers, developing Customized Training contracts for them. Ideally, CT services would be staffed in the OSS Centers.
- Services may be for employers' incumbent workers or the employers may require the CT broker to recruit and screen potential employees for the employer.
- Applicants and proponents for customized training must be employers, with priority given to small businesses that cannot provide for the training themselves.
- The expansion of CT and subsequent solicitations of employers will depend on the amount of WIA funds allocated to this activity by the WISF Board. In order for CT to be available to all employers who need it and would like to take part in this collaboration, the workforce system will need to supply additional funds and/or resources other than WIA.

TIMETABLE

Current subcontracts for Adult job training expire on June 30, 2005. The full WIB should meet in June to consider Executive Committee decisions. The following **tentative** schedule would permit the Staff to conduct a fair and open solicitation:

March 9, 2005	Announcement of solicitation and invitation to Bidders Conference
March 16, 2005	Bidders Conference and release of RFP
April 6, 2005	Due date for proposals
April 27, 2005	Completion of Staff recommendations
May 25, 2005	Executive Committee public hearing and decisions
June 22, 2005	WIB accepts or rejects any or all recommendations
July 1, 2005	PY'05-'06 programs begin

Staff will be present at your meeting on February 23rd to discuss these recommendations. If you have questions before the meeting, please call Pamela Calloway at (415) 923-4465.

cc: Members, WISF Committees

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: March 9, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: AUTHORIZATION FOR YO! SF IMPACT STUDY AND AUDIO/VISIUAL REPORT (AGENDA ITEM 5e)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve the design and selection criteria for a YO!SF Impact Study and a YO!SF Audio/Visual Report.

BACKGROUND

See attachment: Memoranda to Executive Committee for initial approval of projects.

RECOMMENDATION

Staff recommend that the Executive Committee adopt the design and selection criteria for a YO!SF Impact Study and YO!SF Audio/Visual Report

Staff will be present at your March 16 meeting to answer questions. Please contact me at 923.4465 if you need additional information.

Attachments

745 Franklin Street, Suite 200 • San Francisco, CA 94102-3228
Telephone 415.923.4003 • Fax 415.923-6966
www.picsf.org • e-mail: 411@picsf.org
TDD 800.735.2929 (CRS)

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 3, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: ALLOCATION OF TITLE WIA ID (YOUTH OPPORTUNITY GRANT) FUNDS FOR PROFESSIONAL SERVICES CONTRACT TO CONDUCT AN OVERALL PROGRAM EVALUATION OF THE YOUTH OPPORTUNITY PROGRAM OF SAN FRANCISCO (YO! SF).

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve a professional services contract to conduct an overall program evaluation of San Francisco's Youth Opportunity Program (YO! SF).

BACKGROUND

The Department of Labor (DOL) allocated approximately $1.3 billion in 2000 for a five-year national Youth Opportunity Grant, funded through Workforce Investment Act Title ID.

In 2000, San Francisco was awarded $28 million dollar funding for YO!SF. YO!SF has provided services to youth ages 14-21 through collaborations with five community Youth Centers and the formation of collaborations with other youth service providers and subcontractors, since its inception.

Over the course of the program, YO!SF has provided youth development activities, youth education, and employment services to more than 1800 youth residing in San Francisco's federally (HUD) designated Enterprise communities: Mission district, Bayview-Hunters Point, SOMA, and Visitacion Valley neighborhoods. The goal of YO! SF is to increase long-term educational and employment opportunities for youth who reside in these communities.

DOL's funding for Youth Opportunity of San Francisco (YO! SF) ends as of June 30, 2005. Unspent funds will be used to continue the program in a scaled down form in a manner to be determined.

DISCUSSION

The PIC seeks to fund an impact study that would provide analysis of the impact YO! SF has had on the Enterprise Communities, on the youth served through the program and on San Francisco. The proposed impact study would be beneficial to policy makers in determining and guiding investments in youth in San Francisco and California.

Examples of issues the PIC seeks to have covered in the impact study may include (but not be limited to):

- Overall economic impact on the four targeted Enterprise Communities
- Impact on youth incomes
- The significance of crime rates in neighborhoods
- Influence on employers hiring patterns
- Future impact on neighborhoods when students who graduate from college return to community
- Neighborhood renewal impact
- Effect on subcontractors and vendors
- Staff salary impact on local economy

SCOPE OF WORK

After compiling the research, the selected contractor shall perform the following tasks:

- Evaluation Design.
- Data Collection and Site Visits.
- Surveys and Interviews.
- Analyses and Reporting

PERIOD OF PERFORMANCE

The period of performance will not exceed three (3) months from the date of contract execution, anticipated to be released for bidding on April 1 2005. The exact period of performance will be established during contract negotiation with the successful bidder.

RECOMMENDATION

Staff recommends that the Youth Council approve the selection a contractor to complete an impact study by compiling and analyzing qualitative and quantitative data to determine the impact of YO! SF. The research will be compiled into a final report delivered to the PIC by the contractor selected through this procurement process. Staff recommends that YOG funds, in an amount not to exceed $40,000, be committed to the retention of a contractor for the purposes outlined above.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 10, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: ALLOCATION OF TITLE ID (YOUTH OPPORTUNITY GRANT) FUNDS FOR PROFESSIONAL SERVICES CONTRACT TO COMPILE AND FILM A VIDEO "LEGACY" PROJECT OF THE YOUTH OPPORTUNITY PROGRAM OF SAN FRANCISCO (YO!SF).

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve a professional services contract to hire a Videographer to compile and film a video "legacy" project ("Video Project") that will provide an overview of the Private Industry Council's Youth Opportunity (YO!SF) Program. The Video Project is intended to provide a historical context of the program and may be used to procure funding for the continuation of the program.

BACKGROUND

The Department of Labor (DOL) allocated approximately $1.3 billion in 2000 for a five-year national Youth Opportunity Grant, funded through WIA Title ID.

In 2000, San Francisco was awarded $28 million dollar funding for its Youth Opportunity program (YO!SF). YO!SF has provided services to youth through collaborations with other community Youth Centers and the formation of collaborations with youth service providers and subcontractors, since its inception.

Over the course of the program, YO! SF has provided youth development activities, education, and employment services to more than 1800 youth residing in San Francisco's federally (HUD) designated Enterprise communities: Mission district, Bayview-Hunters Point, South of Market Area (SOMA), and Visitacion Valley neighborhoods. The goal of YO! SF is to increase long-term educational and employment opportunities for youth who reside in these communities.

DOL's funding for Youth Opportunity of San Francisco (YO! SF) ends as of June 30, 2005. Unspent funds will be used to continue the program in a scaled down form in a manner to be determined.

DISCUSSION

The PIC seeks to fund a Video Project that provides a historical context of the program and may be used to further sustainability of the program. The Video Project will incorporate existing footage and photos, interspersed with "voice over" narrative providing data related to the project, youth statistics, and information about the Enterprise communities. In addition, interviews with youth, YO staff, parents, employers, educators and any others will form the basis of the Video Project's narrative.

The final product would be a 15 to 20 minute audio-visual presentation that will be delivered in VHS and DVD formats, as well as streaming media that would be viewable from the PICs website. The Video Project is intended to provide an overview of the YO!SF program, its successes, and also to share individual stories of those touched by the program.

SCOPE OF WORK

Over a period of six weeks, the contractor will complete background research, locate archive footage, revise an existing story treatment, oversee pre-production, conduct interviews, create a paper edit from interview transcripts and other footage, cast and rehearse, determine shooting schedule, secure shooting locations, film, edit, secure music for and deliver final version of the Video Project in VHS, DVD and streaming media and other formats as needed.

This is a work-for-hire assignment and the Private Industry Council of San Francisco, Inc. will own all rights to the material. The PIC will also take possession of all materials related to the Video Project, including the master from which duplicates are made, research materials, and all used or unused materials and footage related to the project.

Responsibilities and duties of the contractor will include:

Produce a short, compelling documentary to include original interviews in an audio/ visual format, archive footage, and other materials.

- Research including published media searches, telephone, and in-person interviews
- Oversee pre-production with YO!SF staff
- Conduct field interviews
- Write treatment/script
- Direct shooting crew
- Edit the Video Project
- Incorporate changes made by YO! SF into final version of Video Project

PERIOD OF PERFORMANCE

The period of performance will not exceed six (6) weeks from the date of the execution of contract, anticipated to be released for bidding on April, 1 2005. The exact period of performance will be established during contract negotiation with the successful bidder.

RECOMMENDATION

Staff recommends that the Youth Council approve the selection of a contracted Videographer to compile and film a video “legacy” project (“Video Project”) that will provide an overview of San Francisco’s Youth Opportunities Program.

The Video Project will be edited into a final version to be delivered to the PIC in the form of VHS, DVD, and streaming media by the contractor selected through this procurement process. Staff recommend that YOG funds, in an amount not to exceed $20,000, be committed to this project.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 24, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: WIA FORMULA YOUTH PROGRAM EVALUATION PROCESS, CRITERIA AND TOOLS (AGENDA ITEM 5f)

ACTION REQUESTED

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action to approve an evaluation process, criteria, and tools to be used for awarding Workforce Investment Act (WIA) formula youth funds for the program year (PY) beginning July 1, 2005.

BACKGROUND

Today, the Youth Council discussed the program year (PY) 2005-2006 youth services funding process. The PIC conducted a solicitation at the conclusion of the Youth Council's strategic planning process last year and the Youth Council indicated its desire to evaluate existing contractor performance and make PY 05-06 funding recommendations based on that performance analysis. The proposed subcontractor performance measurement focuses on the extent to which the Youth Council's strategic and supportive priorities are being met as well as the attainment of contractual goals. Staff will collect and analyze subcontractor performance based on your adopted criteria and values, and with that data, present specific funding recommendations when PY 05-06 local WIA allocations are announced.

RECOMMENDATIONS

TIME PERIOD, STATISTICAL DATA TO BE EVALUATED, AND DEFINITION OF "GOOD STANDING"

Youth Council recommends evaluating PY 2004 program data from July 1, 2004 – April 30, 2005. In addition, because outcome data is sparse and a large percentage (78%) of youth enrolled have not exited services, the Youth Council recommends evaluating actual versus planned enrollments only. It is recommended that programs which, by April 30, 2005, have reached 75% of their enrollment goal for April be deemed in "good standing" and be eligible to receive a hold harmless amount equal to 50% of their current percentage of the funds awarded. For instance, if a program is currently receiving 5% of the total funds awarded to programs, and achieves 75% of its April enrollment goal, it would receive a baseline amount of 50% of 5% of the total amount of

PY 2005 funds awarded to programs. Awards would increase every 5-percentage points as shown in the following table:

% of April Enrollment Goal Achieved	% of current % of funds to be awarded
75%	50%
80%	55%
85%	60%
90%	65%
95%	70%
100%	75%

PRINCIPLES, CONDITIONS, AND STRATEGIES TO BE EVALUATED AND EVALUATION TOOL

Using principles, conditions, and strategies from the Youth Council's Strategic Priorities document, staff developed an evaluation tool that can be used to ascertain the extent to which individual programs are meeting the Youth Council's stated priorities. The tool – *Draft 2005 WIA Formula Youth Program Evaluation of Principles, Conditions, and Strategies.* It contains:

- The seven Basic Youth Development Principles from the Youth Council's Strategic Priorities document
- Seven of the conditions one would find in a comprehensive youth serving system from the Youth Council's Strategic Priorities document
- Three Primary Strategies
- One Supportive Strategy.

When analyzing the document, staff found some overlap in the principles, conditions, and strategies, therefore a few were combined in the draft evaluation tool and given additional weight because they were mentioned more than once by the Youth Council as being a priority. The Youth Council recommends using this tool to measure the extent to which a program is helping the Council meet its strategic and supportive priorities, and assigning it a weight of 90% for award of incentive funds available to programs over and above their baseline amounts.

PROGRAM SELF-EVALUATIONS

The Youth Council recommends using a self-evaluation report from programs, and assigning the responses a weight of 10% for award of incentive funds available to programs over and above their baseline amounts. Some sections of the prior self-evaluation form were incorporated in this document. Staff will use the part of the former self-evaluation document containing the ten required youth development program elements as a monitoring tool that will also inform the evaluation of the principles, conditions, and strategies.

If you have any questions prior to the meeting, please contact Karen Hart at (415) 923-4260.

cc: WISF Board Members
WIA Formula-Funded Youth Program Subcontractors

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: MAY 13, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: STRATEGIC BUDGETING OF WORKFORCE INVESTMENT ACT ADULT FORMULA PROGRAM (AGENDA ITEM 5h)

Action Requested

The Workforce Investment San Francisco (WISF) Board is asked to ratify the Executive Committee action on investment options and their priority for the Workforce Investment Act (WIA) Adult formula funds expected to become available for PY 2005-06 beginning July 1, 2005.

Recommended investment options and priority for PY 05-06

1. **Strengthen the One Stop system and center infrastructure**
   Capacity building will enrich both job-seeker and employer experience.
   Increase assessment services, case management, and placement.
   Increase marketing and promotion, employer outreach, and website development.

2. **Strengthen employer services**
   Employers will benefit from an HR department they can "borrow."
   Increase screening and referring of potential employees, customized training.
   Increase marketing and assistance with employment law.

3. **Strengthen customer choice**
   Job seekers will benefit from a wider range of services and choices.
   Increase assessment (self discovery), career counseling, and case management.
   Increase resources for ETPL development and Individual Referral training.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** DECEMBER 7, 2004

FROM: EXECUTIVE COMMITTEE

SUBJECT: EXPENDITURE PLAN FOR UNSPENT FFY 2003 REFUGEE FORMULA FUNDS (Agenda Item 6a)

ACTION REQUESTED

The Workforce Investment San Francisco Board is asked to ratify the Executive Committee action to approve an expenditure plan for unspent Federal Fiscal Year (FFY) 2003 Refugee Employment Social Services (RESS) and Targeted Assistance (TA) formula funds.

AVAILABLE FUNDS

The amount of service funds that are unexpended from FFY 2003 and will be carried forward to FFY 2004 program are:

Carry forward FFY 03 TA funds	$38,393
Carry Forward FFY 03 RESS funds	$6,481
Total	**$44,874**

The unspent RESS funds are from the supportive services pool and services' subcontracts. The unspent TA funds are from a State augmentation of funds unspent by other counties ($22,395) and from another State augmentation received November 19, 2004 of unspent State Administration funds ($11,843). There was also a small amount of funds ($4,155) unspent from the supportive services pool and services' subcontracts.

BACKGROUND

FFY 2004 refugee funding was initially allocated and approved through a Request For Proposals (RFP) process in August 2004. Three of the four proponents were funded: Catholic Charities CYO (CCCYO), Jewish Vocational Service (JVS), and International Rescue Committee. Two of the three, CCCYO and IRC, received the amount they requested and therefore were not eligible to receive any additional carry forward funds. The fourth proponent, African Immigrant & Refugee Resource Center (AIRRC) was not funded through the initial RFP process due to its under-developed program and because necessary agency infrastructure changes (support for direct services staff) had not been accomplished since the agency was de-funded by PIC three years ago.

RECOMMENDATION FOR UNSPENT FUNDS

The Program Resources Committee (PRC) met on December 7, 2004, reviewed staff's recommendations, took public testimony, and formulated an alternate expenditure plan.

Because the JVS Employment Services (ES) program's placement rate has continued to be low (31% after 14 months), staff did not recommend it for additional funds. AIRRC was not included in staff's recommendation (see "Background"). The PRC, however, was interested in supporting the AIRRC and its clients with the carry forward funds; therefore the PRC recommends allocating the funds to the AIRRC. Staff will closely monitor the AIRRC program and provide technical assistance as needed.

cc: Refugee Proponents
DHS Staff
PIC Staff

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** MARCH 9, 2005

FROM: EXECUTIVE COMMITTEE

SUBJECT: RECOMMENDATION TO APPROVE CUSTOMIZED TRAINING FUNDING TO THE SAN FRANCISCO CHAMBER OF COMMERCE TO OPERATE THE LEGAL SKILLS TRAINING AND ADVANCEMENT RESOURCES (STAR) PROJECT (Agenda Item 6b)

ACTION REQUESTED

The Committee is asked to approve funding in the amount of **$15,000** for SFWorks to operate a customized training program with Jewish Vocational Service (JVS) as the selected training provider for the benefit of a group of law firms and corporate legal departments that have yet to be fully identified. The total cost of the training is $30,000. SFWorks will match WIA Customized Training Funds in the amount of no less than $15,000, drawing on a grant from the Mott Foundation and employer contributions, to enhance the skills of 12 to15 incumbent entry-level legal support staff, enabling them to advance in their careers. The entire amount requested is to be used for training.

BACKGROUND

On April 11, 2003, the Executive Committee adopted the Customized Training policy recommendation by the Employer Services Committee. The intent of the Customized Training Program is to meet the special skills requirements of an employer or a group of employers. The training is typically provided by a third party trainer selected by the employer. The training targets unemployed individuals or employed individuals who earn less than the self-sufficient wage as determined by the Workforce Investment San Francisco (WISF) Board. The employer is required to cover at least 50% of the training cost. However, the Customized Training policy states that “in cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer’s fee.”

On March 2, 2005, SFWorks and JVS jointly submitted a proposal for funding of a Customized Training program. Based on staff’s review of the proposal, the program intends to train 12 to 15 individuals who currently earn between $12 to $15 per hour. The program is designed to teach incumbent entry-level legal support staff job skills that are essential to job advancement. Acquiring better communication and enhanced computer and career management skills are the training’s anticipated outcomes. The program will also help address the projected labor shortage of legal administrative support.

The program has been in existence for two cycles. The second cycle graduated seven participants in July 2004. Five participants in that cycle were supported by Customized Training funds. Four of those participants completed training. Two received an increase in their hourly wage, one to $12/hour and the other to $17.94/hour, while the other two received an increase in work hours, resulting in an income increase. The program's two cycles have served 12 law firms and one corporate legal department.

The duration of the course is 60 hours. SFWorks, as the intermediary between the employers and the WISF, has agreed in good faith to make an effort to see that individuals are retained and advanced upon successful completion of the training. Advancement takes the form of new job responsibilities and a wage increase.

As in the previous cycle, employers will provide paid release time for their employees who participate in the program. In addition, employers will pay a $300 fee per participating employee to SFWorks to underwrite the cost of the training.

Since this program was developed as a long-term solution to workforce needs in the legal field, the program is not linked to any single employer. SFWorks would serve as the intermediary acting on behalf of multiple employers. This arrangement is consistent with the WISF's Customized Training policy. The policy requires an employer to pay for at least 50% of the cost of training. However, "In cases where employers are unable to pay for at least 50% of the training cost, private funds, such as philanthropic dollars, may be used to substitute the employer's fee."

RECOMMENDATION

Staff recommends that the Executive Committee authorize the project.

If you have any questions prior to the meeting, please contact Joel Streicker at (415) 923-4274.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** JUNE 15, 2005

FROM: LYNN BUNIM, EXECUTIVE COMMITTEE CHAIR

SUBJECT: WIA FORMULA YOUTH PROGRAM FUNDING RECOMMENDATIONS (AGENDA ITEM 7)

ACTION REQUESTED

The WISF Board is asked to approve the performance data and funding awards for the Workforce Investment Act (WIA) formula youth subcontractors.

BACKGROUND

The Executive Committee, on June 7, 2005 and also today, reviewed the results of the Youth Council's evaluation process and its recommended allocation of the WIA formula youth funding. The recommended programs will serve approximately 500 youths with these funds.

RECOMMENDATIONS

Attached for your review is a spreadsheet containing the evaluation results and recommended dollar amounts for PY 05-06. The spreadsheet includes subcontractors' current funding amounts, planned and actual enrollments with percentage of goal achieved, evaluation scores, and recommended dollar amount for PY 05-06, based on previously approved criteria.

The Executive Committee recommends that the WISF Board ratify the attached performance and evaluation data and funding awards for PY 05-06 WIA Youth programs.

(See reverse)

cc: WIA Formula-Funded Youth Program Subcontractors

TABLE I
WIA 1B YOUTH SUBCONTRACTORS
PERFORMANCE EVALUATION AND FUNDING AWARD PY 05-06

SUBCONTRACTOR	Sub-K Award PY 04-05	Planned Enrollment 4/30/05	Actual Enrollment 4/30/05	%	Evaluation Score	Recommended Amount PY 05-06
Asian Neighborhood Design	$81,303	16	19	119%	93%	**$72,451**
Boys & Girls Clubs of SF	$86,693	20	20	100%	90%	**$75,132**
Episcopal Community Services *	$57,842	29	14	48%	NA	**$0**
Family Service Agency S.F. TAPP	$90,651	29	29	100%	96%	**$79,000**
Golden Gate Community, Inc	$89,049	18	18	100%	94%	**$77,533**
Indo-Chinese Housing Dev. Corp.	$102,336	45	45	100%	96%	**$86,317**
Ingleside Community Center	$70,949	16	18	113%	88%	**$64,810**
International Institute of SF	$60,000	23	23	100%	96%	**$59,807**
Jewish Vocational Service	$93,478	28	25	100%	93%	**$80,075**
Larkin Street Youth Services	$94,138	25	25	100%	95%	**$81,183**
LYRIC-Lavender Youth Recreation & Info.Center	$91,593	28	33	118%	93%	**$78,895**
Mission Hiring Hall, Inc.	$94,378	18	21	117%	91%	**$80,175**
Mission Language & Vocational School, Inc.	$86,646	23	23	100%	96%	**$76,492**
Mission Neighborhood Centers/ RAP Coll.	$92,724	30	33	110%	90%	**$80,601**
Renaissance Parents of Success	$106,482	28	28	100%	95%	**$88,681**
Rose Resnick Lighthouse for the Blind	$31,927	9	9	100%	96%	**$31,927**
San Francisco Sheriff's Department	$93,666	25	24	96%	93%	**$76,283**
SF Learns	$96,493	25	24	96%	91%	**$77,472**
The Family School	$94,420	26	26	100%	95%	**$81,128**
YMCA of SF/Youth Chance High School	$97,585	17	16	94%	93%	**$78,573**
Young Scholars Program	$96,466	30	30	100%	93%	**$81,946**
Youth Guidance Center Improvement Committee/Youth Treatment & Education Court	$85,826	18	20	111%	92%	**$75,052**
TOTAL	$1,894,645	**522**	**523**	100%		**$1,581,841**

* Episcopal Community Services did not meet the minimum enrollment criteria.

6/15/05

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date: Wednesday, October 19, 2005
Time: 9:30 a.m. – 11:30 a.m.
Location: San Francisco State University
Downtown Center
425 Market Street
3rd Floor, Room 305
San Francisco, CA 94105

Copies of materials may be obtained from and/or reviewed at the PIC office at the address shown below and on the PIC's website: http://www.picsf.org

AGENDA APPEARS ON THE REVERSE SIDE

Know Your Rights Under the Sunshine Ordinance

(Chapter 67 of the San Francisco Administrative Code)

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Sunshine Ordinance Task Force
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San Francisco, CA 94102-4683
Phone: (415) 554-7724
Fax: (415) 554-5163
Email: sotf@sfgov.org
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Other Accommodations

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Issued: Wednesday, October 12, 2005

PROPOSED AGENDA
MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, OCTOBER 19, 2005

Public Testimony will be taken throughout the meeting

1. Adoption of the Agenda *(Action Item)*
2. Adoption of minutes from the meeting held on May 5th and June 28, 2005 *(Action Item)**
3. Update on work of the Executive Committee (Information Item)
4. Update from the Private Industry Council of San Francisco, Inc. (Information Item)
5. The Boston Workforce System (Presentation)
6. Proposed Workplan for the Workforce Investment San Francisco Board (Presentation *and Possible Action Item)**
7. Chair's Report (Discussion Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Adjournment *(Action Item)*

*Information to follow

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date: Wednesday, February 15, 2006

Time: 9:30 a.m. – 11:30 a.m.

Location: San Francisco Baha'i Center
170 Valencia Street, 3rd Floor
San Francisco, CA 94103-1116

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/06

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Issued: Wednesday, February 08, 2006

PROPOSED AGENDA
MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, FEBRUARY 15, 2006

Public Testimony will be taken throughout the meeting

1. Adoption of the Agenda *(Action Item)*
2. Adoption of minutes from the meeting held on August 17, 2005
3. Update from the Private Industry Council of San Francisco, Inc. (Information Item)
4. Workforce Investment Act (WIA) Program Design for PY 2006-07 (*Action Item*)
5. Presentation of San Francisco Economic Strategy (Discussion Item)
6. Workforce Development Strategic Planning Process (*Action Item*)
7. Chair's Report (Discussion Item)
8. Public Testimony on Non-Agenda Items (Discussion Item)
9. Future Agenda Items (Discussion Item)
10. Adjournment *(Action Item)*

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD

DATE: FEBRUARY 9, 2006

FROM: LYNN BUNIM, BOARD CHAIR

SUBJECT: WORKFORCE INVESTMENT ACT PROGRAM DESIGN FOR PY 2006-07 (AGENDA ITEM 4)

ACTION REQUESTED

The Board is asked to ratify the Executive Committee's decision of February 1 authorizing the Private Industry Council to administer its PY 2006-07 Workforce Investment Act (WIA) programs in a fashion similar to its current year programs.

BACKGROUND

Our role in developing the City's workforce is to provide goal setting and policy coordination to resource administrators and partners of the One Stop system. The Private Industry Council (PIC) receives annual WIA allocations for three major programs: **Adult** training services, **Youth** development, and **Dislocated Worker** assistance. Totals to San Francisco have ranged from $5.6m to $7.9m over the past six years, but resources are expected to drop in the coming year due to federal budget cuts.

PROGRAM DESIGN

Program design refers to the intended beneficiaries and how they should be helped. All of the WIA funds are accompanied by State and local *performance goals* spelled out in the Act. Local **Youth** and **Dislocated Worker** services are true implementations of the federal design, but **Adult** programs in San Francisco have utilized an exception in the Act that permits funding to be directed to *"... a training services program of demonstrated effectiveness offered in the local area by a community-based organization or another private organization to serve special participant populations that face multiple barriers to employment."*

Virginia Hamilton of the California Workforce Association testified that San Francisco is one of the few areas in California still using the CBO exception, and the only urban area to do so; most of the nation's WIA Adult funds are used to provide individualized, up-front assessment and case-managed referral to a State-approved training providers based on customer choice.

Wes Dixon of the PIC testified that both CBO-based cohort training and One Stop-based customer-choice training are effective, and each have advantages and disadvantages. Steve Arcelona, PIC Board Chair, testified that his Board's preference is to continue the current configuration of programs for another year while the Mayor's Office of Economic and Workforce Development fully engages its planning process.

The Executive Committee considered three options for next year's programs, after reviewing detailed participant characteristics and performance metrics:

Option 1	Continue a hybrid Group-Individual Referral (IR) mix of training providers *with* a new solicitation for community-based organizations to serve special participant populations facing multiple barriers to employment; or
Option 2	Continue a hybrid Group-IR mix of providers *without* a new solicitation; or
Option 3	Convert Adult training to an all-IR, customer-choice system operating from One Stop centers using ETPL State-approved training providers.

RECOMMENDATION

The Executive Committee recommends a modified Option 2, which would permit extending current contracts for an additional year without a new solicitation. The PIC will return to the Executive Committee in March to present performance data on the eight group subcontracts, and make recommendations on continuation of subcontracts based on performance. Should the Executive Committee determine that subcontracts should be reduced or eliminated based on review of performance data, such a recommendation would be brought back to the full WISF for final approval. If subcontracts are reduced, such funds will shift to One Stop Individual Referral pool.

PIC's Board of Directors will be guided by WISF Board policy in its WIA budgeting for PY 2006-07, after allocations are announced.

WORKFORCE INVESTMENT SAN FRANCISCO
Local Workforce Investment Board for the City and County of San Francisco

MEMORANDUM

TO: WISF BOARD **DATE:** FEBRUARY 8, 2006

FROM: LYNN BUNIM, BOARD CHAIR

SUBJECT: STRATEGIC WORKFORCE INVESTMENT PLANNING (AGENDA ITEM 6)

ACTION REQUESTED

The WISF Board is asked to approve a request to the Private Industry Council to enter into a professional services agreement with Kevin Stange to support the Board's strategic planning.

BACKGROUND

At your February 15 meeting, Kevin Stange will outline his recommendations for a strategic planning process for local workforce development that is in synch with planning for economic development. As this work gets underway, the Governor will issue instructions to local WIBs and workforce areas asking them to submit Strategic Two-Year Plans for the use of federal Workforce Investment Act funds. The WISF Board needs a strategic planning process capable of synthesizing the many local-state-federal requirements.

RECOMMENDATION

Mr. Stange has provided professional research services to the WISF Board on a number of past occasions, and is familiar with the service delivery system outlined in the Workforce Investment Act of 1998. The WISF Board should authorize PIC to negotiate a contract with him for the services needed.

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

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Date:	Wednesday, March 22, 2006
Time:	9:30 a.m. – 11:30 a.m.
Location:	City Hall, Room 201 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102

Copies of materials may be obtained from and/or reviewed at the PIC office at the address shown below and on the PIC's website: http://www.picsf.org

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Issued: Wednesday, March 15, 2006

PROPOSED AGENDA
MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, MARCH 22, 2006

Public Testimony will be taken throughout the meeting

1. Adoption of the Agenda *(Action Item)*
2. Adoption of minutes from the meeting held on February 15, 2006
3. Strategic Planning Workshop – Kevin Stange (Discussion Item)
4. Update of San Francisco Economic Strategy – Ted Egan (Discussion Item)
5. Chair's Report (Discussion Item)
6. Public Testimony on Non-Agenda Items (Discussion Item)
7. Future Agenda Items (Discussion Item)
8. Adjournment *(Action Item)*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

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NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date:	Wednesday, May 24, 2006
Time:	9:30 a.m. – 11:30 a.m.
Location:	San Francisco Baha'i Center 170 Valelncia Street, 3rd Floor San Francisco, CA 94103

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Issued: Wednesday, May 17, 2006

PROPOSED AGENDA
MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, MVAY 24, 2006

Public Testimony will be taken throughout the meeting

1. Adoption of the Agenda *(Action Item)*
2. Adoption of minutes from the meeting held on March 22, 2006 (*Action Item*)
3. Update from the Private Industry Council of San Francisco (Discussion Item)
4. Strategic Planning Update – Kevin Stange (Discussion Item)
5. Workforce Investment Act (WIA) Allocations (Discussion Item)
6. Chair's Report (Discussion Item)
7. Public Testimony on Non-Agenda Items (Discussion Item)
8. Future Agenda Items (Discussion Item)
9. Adjournment *(Action Item)*

WORKFORCE INVESTMENT SAN FRANCISCO

Local Workforce Investment Board for the City and County of San Francisco

NOTICE OF A PUBLIC MEETING
OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD

Date:	Wednesday, November 29, 2006
Time:	9:30 a.m. – 11:30 a.m.
Location:	City Hall in Room 201 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102

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29/06

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Issued: Tuesday, November 21, 2006

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11-27-06 10: RCVD

AGENDA FOR THE MEETING OF THE
WORKFORCE INVESTMENT SAN FRANCISCO BOARD
WEDNESDAY, NOVEMBER 29, 2006

1. Adoption of the Agenda *(Action Item)*
2. Public Testimony on Agenda Item *(Discussion Item)*
3. Update on WISF Board Recruitment *(Discussion Item)*
4. Mayor's Office, Workforce Development Department -Strategic Plan *(Discussion Item)*
5. Chief of Staff Report *(Discussion Item)*
6. Chair's Report *(Discussion Item)*
7. Public Testimony on Non-Agenda Items *(Discussion Item)*
8. Future Agenda Items *(Discussion Item)*
9. Adjournment *(Action Item)*

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